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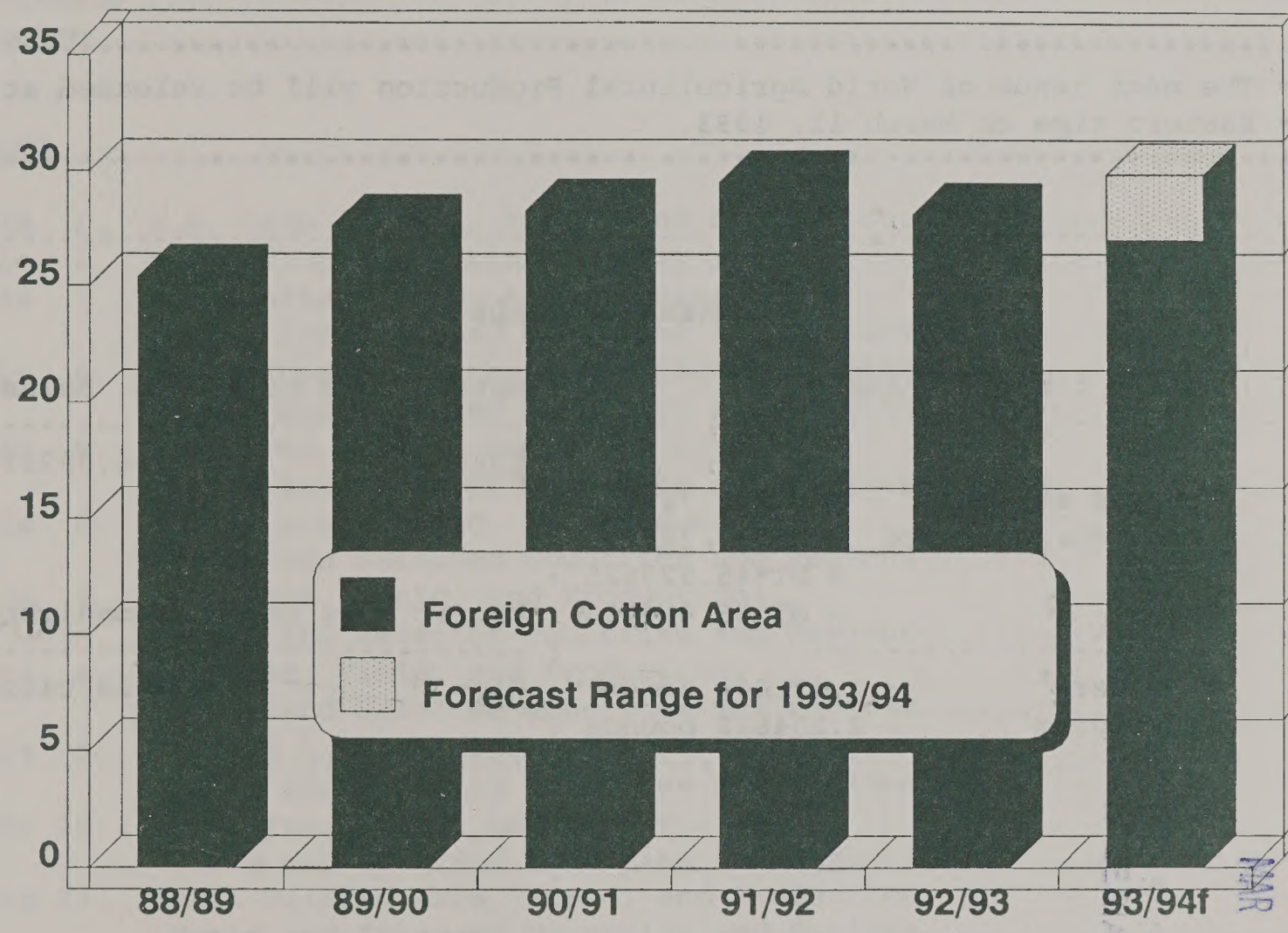
Foreign
Agricultural
Service

Circular Series
WAP 2-93
February 1993

World Agricultural Production

1993/94 Forecast of Foreign Cotton Area

Million Hectares



Production Articles This Month...

- Foreign Cotton Area
- Indian Sugar
- World Rice
- 1992 FSU Results
- South African Corn
- Brazil Soybean Trip Report
- Indian Wheat and Rapeseed
- Deciduous Fruit and Table Grapes

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. This report is based on unrounded data; numbers may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-275), February 10, 1993.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 720-0888 or by FAX (202) 720-8880.

 * The next issue of World Agricultural Production will be released at 3 p.m. *
 * Eastern time on March 11, 1993. *

:			:
:	CONVERSION TABLE		:
:			:
:	Metric tons to bushels	:	Metric tons to 480-lb. bales
:	-----	:	-----
:		:	Cotton = MT*4.592917
:	Wheat & soybeans = MT*36.7437	:	
:	Corn, sorghum, rye = MT*39.36825	:	
:	Barley = MT*45.929625	:	
:	Oats = MT*68.894438	:	Metric tons to hundredweight
:	-----	:	-----
:	1 hectare = 2.471044 acres	:	Rice = MT*22.04622
:	1 kilogram = 2.204622 pounds	:	

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PRODUCTION HIGHLIGHTS FOR 1992/93

February 1993

WHEAT: World production for 1992/93 is estimated at 558.3 million tons, up 2.0 million or less than 1 percent from last month and up 3 percent from the previous year. Total foreign production is estimated at 491.4 million tons, up 2.0 million or less than 1 percent from last month and up slightly from 1991/92. Country highlights are as follows:

- o United States Production is estimated at 66.9 million tons, unchanged from last month, but up 24 percent from 1991/92.
- o Australia Production is estimated at 15.0 million tons, up 1.0 million or 7 percent from last month and up 40 percent from 1991/92. Excellent yields in southern Australia due to late season rainfall boosted estimated output.
- o Argentina Production is estimated at 9.2 million tons, up 0.7 million or 8 percent from last month, but down 7 percent from 1991/92. Favorable rainfall during the grain-fill stage improved prospective yield. The harvest is nearly complete.
- o FSU-12 Production is estimated at 89.3 million tons, up 0.3 million or less than 1 percent from last month and up 23 percent from 1991/92. Official FSU data indicated higher estimated production.

COARSE GRAINS: World production for 1992/93 is estimated at 847.9 million tons, up 5.5 million or 1 percent from last month and up 6 percent from the 1991/92 harvest. Total foreign production is estimated at 570.2 million tons, up 5.5 million or 1 percent from last month, but down 2 percent from last season. Country highlights are as follows:

- o United States Production is estimated at 277.7 million tons, unchanged from last month, but up 27 percent from 1991/92.
- o FSU-12 Production is estimated at 91.2 million tons, up 2.3 million or 3 percent from last month and up 25 percent from 1991/92. Higher estimated barley, oats, and rye production more than offset a decrease in corn output.
- o Brazil Production is forecast at 27.8 million tons, up 2.0 million or 8 percent from last month, but down 5 percent from 1991/92. Recent field travel by USDA personnel indicates higher estimated corn area and yield; harvest begins this month.

- o Argentina Production is forecast at 14.6 million tons, up 1.2 million or 9 percent from last month and up 2 percent from last season. The forecast corn output is higher due to favorable rainfall and warm temperatures. However, isolated dry areas and early frost damage will likely keep yields below the 1991/92 record.
- o EC-12 Production is estimated at 81.8 million tons, up 0.7 million or 1 percent from last month, but down 9 percent from 1991/92. Harvest results from France indicate a record corn yield.
- o Egypt Production is estimated at 5.3 million tons, down 0.5 million or 9 percent from last month, but up slightly from the previous harvest. Lower estimated corn area caused the production decline.
- o Philippines Production is forecast at 4.6 million tons, down 0.3 million or 6 percent from last month, but up 2 percent from 1991/92. Dry weather at planting, mostly in Mindanao, reduced estimated harvested area to the lowest level in 8 years.

RICE (MILLED-BASIS): World production for 1992/93 is projected at 351.8 million tons, up 0.3 million or less than 1 percent from last month and up 1 percent from the 1991/92 crop. Total foreign production is projected at 346.2 million tons, up 0.3 million or less than 1 percent from last month and up 1 percent from 1991/92. Country highlights are as follows:

- o United States Production is estimated at 5.7 million tons, unchanged from last month, but up 13 percent from 1991/92.
- o Egypt Production is estimated at 2.6 million tons, up 0.4 million or 16 percent from last month and up 12 percent from last season. The estimated output was raised due to higher-than-anticipated area and yield.
- o Laos Production is estimated at 1.0 million tons, up 0.2 million or 23 percent from last month and up 28 percent from 1991/92. Favorable weather and a larger estimated harvested area accounted for the production increase.
- o Thailand Production is estimated at 13.1 million tons, down 0.2 million or 2 percent from last month and down 3 percent from 1991/92. The main season crop was reduced owing to initial post-harvest results.

o Cambodia

Production is estimated at 1.4 million tons, down 0.2 million or 11 percent from last month and down 8 percent from last season. Reduced plantings, delays due to erratic rainfall, and a shortage of farm inputs lowered estimated output.

OILSEEDS: World production for 1992/93 is forecast at a record 224.7 million tons, down slightly from last month, but up slightly from 1991/92. Foreign production for 1992/93, including copra and palm kernel, is forecast at 156.0 million tons, down slightly from last month, but up 3 percent from last season. Total oilseed production in the United States is forecast at 68.7 million tons, unchanged from last month, but up 7 percent from 1991/92.

- * Soybeans: World production for 1992/93 is forecast at 114.4 million tons, up 0.8 million or 1 percent from last month and up 7 percent from 1991/92. Total foreign production is forecast at 54.6 million tons, up 0.8 million or 1 percent from last month and up 4 percent from 1991/92. Country highlights are as follows:

o United States

Production is estimated at 59.8 million tons, unchanged from last month, but up 11 percent from last season.

o Brazil

Production is projected at 20.8 million tons, up 0.8 million or 4 percent from last month and up 8 percent from 1991/92. Recent field travel by USDA personnel indicates increased harvested area and a better-than-expected yield.

- * Cottonseed: World production for 1992/93 is projected at 31.9 million tons, down 0.8 million or 3 percent from last month and down 13 percent from 1991/92. Total foreign production is forecast at 26.3 million tons, down 0.8 million or 3 percent from last month and down 14 percent from last season. Country highlights are as follows:

o United States

Production is projected at 5.7 million tons, unchanged from last month, but down 10 percent from 1991/92.

o Pakistan

Production is projected at 3.3 million tons, down 0.7 million or 17 percent from last month and down 25 percent from 1991/92. The estimated output was reduced due to insect infestations and disease problems resulting from earlier flooding in the major producing areas.

o India

Production is projected at 4.1 million tons, down 0.2 million or 5 percent from last month, but up 3 percent from last season. Output was reduced due to lower-than-expected yields in the northern producing states.

- * Peanuts: World production for 1992/93 is forecast at 22.1 million tons, down marginally from last month and down 1 percent from 1991/92. Total foreign production is forecast at 20.1 million tons, down marginally from last month, but up 1 percent from last season. Country highlights are as follows:
 - o United States Production is estimated at 1.9 million tons, unchanged from last month, but down 13 percent from 1991/92.
- * Sunflowerseed: World production for 1992/93 is forecast at 21.5 million tons, down 0.6 million or 3 percent from last month, but up slightly from 1991/92. Total foreign production is forecast at 20.3 million tons, down 0.6 million or 3 percent from last month, but up 3 percent from last season. Country highlights are as follows:
 - o United States Production is projected at 1.2 million tons, unchanged from last month, but down 28 percent from 1991/92.
 - o FSU-12 Production is projected at 5.5 million tons, down 0.6 million or 9 percent from last month and down 2 percent from 1991/92. Yield reductions in Russia, Ukraine, and Kazakhstan caused the decline in estimated output.
- * Rapeseed: World production for 1992/93 is projected at 26.4 million tons, up slightly from last month, but down 7 percent from 1991/92. Total foreign production is projected at 26.3 million tons, up slightly from last month, but down 7 percent from last season. Country highlights are as follows:
 - o United States Production is estimated at 85,000 tons, unchanged from last month, but down 10 percent from last year's harvest.
- * Copra: World production for 1992/93 is forecast at 4.9 million tons, up 0.4 million or 9 percent from last month and up 1 percent from 1991/92.
 - o Philippines Production is forecast at 2.0 million tons, up 0.3 million or 17 percent from last month and up 3 percent from last season. Drought-reduced output in Mindanao will likely be more than offset by increased production in Luzon and the Visayas.
- * Palm Kernels: World production for 1992/93 is forecast at 3.6 million tons, unchanged from last month, but up 7 percent from last year. There were no significant country changes this month.
- * Palm Oil: World production for 1992/93 is forecast at 12.3 million tons, unchanged from last month, but up 7 percent from last year. There were no significant country changes this month.

COTTON: World production for 1992/93 is projected at 84.1 million bales, down 1.6 million or 2 percent from last month and down 12 percent from the 1991/92 record crop. Total foreign production is projected at 67.8 million bales, down 1.6 million or 2 percent from last month and down 13 percent from the record crop of last year. Country highlights are as follows:

- o United States Production is estimated at 16.3 million bales, unchanged from last month, but down 8 percent from 1991/92.
- o Pakistan Production is estimated at 7.5 million bales, down 1.5 million or 17 percent from last month and down 25 percent from last year's record crop. The 1992/93 cotton crop suffered one of the most severe floods on record, reducing harvested area. Further, farmers' inability to complete timely pesticide spraying and a widespread occurrence of leaf curl virus (LCV) reduced yield and lint output.
- o India Production is estimated at 9.8 million bales, down 0.2 million or 2 percent from last month, but up 5 percent from last season. Yields in the heavily irrigated northern states were lower than previously estimated.
- o Argentina Production is estimated at 0.8 million bales, down 0.1 million or 11 percent from last month and down 30 percent from last season's flood-reduced harvest. The crop was affected by cold weather during sowing and heavy rains during December and January. February weather will be a key factor in cotton production this year.
- o Paraguay Production is estimated at 0.8 million bales, down 0.1 million or 11 percent from last month, but up 14 percent from last season's weather-reduced crop. This year's area did not reach expected levels because of low government support levels, high production costs, and a poor 1991/92 crop.
- o FSU-12 Production is estimated at 9.6 million bales, up 0.2 million or 2 percent from last month, but down 15 percent from the 1991/92 crop. Civil unrest in Tajikistan and Azerbaijan has subsided, aiding harvest operations.
- o Egypt Production is estimated at 1.6 million bales, up 0.1 million or 7 percent from last month and up 20 percent from last season. The increase is attributed to an improvement in yield due to favorable weather and the increased use of pesticides.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD			PRODUCTION		
	Prel.	1991/92	Proj.	Prel.	1991/92	Proj.	Prel.	1991/9	1992/93 Proj.	Prel.	1991/92	1992/93 Proj.
	1990/91	1991/92	1992/93	1990/91	1991/92	1992/93	1990/9	1991/9	1992/93 Proj.	1990/91	1991/92	1992/93 Proj.
	---Million acres---			---Million acres---			---Bushels per acre---			---Million bushels---		
All Wheat	77.2	69.9	72.3	69.3	57.7	62.4	39.5	34.3	39.4	2,736	1,981	2,459
Winter	56.9	51.1	51.1	49.9	39.4	41.9	40.7	34.8	38.3	2,031	1,373	1,607
Other	20.3	18.9	21.2	19.4	18.3	20.5	36.4	33.3	41.5	706	608	852
Rye	1.6	1.7	1.6	0.4	0.4	0.4	27.1	24.6	29.4	10	10	12
Soybeans	57.8	59.2	59.3	56.5	58.0	58.4	34.1	34.2	37.6	1,926	1,987	2,197
Corn	74.2	76.0	79.3	67.0	68.8	72.1	118.5	108.6	131.4	7,934	7,475	9,479
Sorghum	10.5	11.1	13.3	9.1	9.9	12.2	63.1	59.3	72.8	573	585	884
Barley	8.2	8.9	7.8	7.5	8.4	7.3	56.1	55.2	62.4	422	464	456
Oats	10.4	8.7	8.0	5.9	4.8	4.5	60.1	50.7	65.6	358	243	295
							---Pounds per acre---			---Million CWT---		
Rice	2.9	2.9	3.2	2.8	2.8	3.1	5,529	5,674	5,722	156.1	157.5	179.1
All Cotton	12.3	14.1	13.3	11.7	13.0	11.2	634	652	700	15.5	17.6	16.3
										---Million 480-pound bales---		

1/ All estimates are from the USDA National Agricultural Statistics Service (NASS) and are published in the Crop Production circular from NASS.

February 1993

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 2
World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe			FSU-12			Asia			South America		Selected Other		All Other Countries
			United States	Canada	Mexico	EC-12	Oth. W. Europe	Eastern Europe	China	India	Indo-nesia	Paki-stan	Thai-land	Argen-tina	Brazil	Aus-tralia	South Turkey Africa		
—Million metric tons—																			
<u>Wheat</u> 1990/91 1991/92 prel. 1992/93 proj.	588.1	513.6	74.5	32.1	3.9	84.7	5.2	41.3	100.3	98.2	49.9	0.0	14.4	0.0	10.9	3.1	15.1	1.7	16.0
	542.9	488.9	53.9	31.9	3.7	90.0	4.1	38.3	72.3	96.0	55.1	0.0	14.6	0.0	9.9	3.0	10.7	2.1	16.5
	556.4	489.4	66.9	29.9	3.0	84.8	3.5	26.9	89.0	101.0	55.0	0.0	15.6	0.0	8.5	2.8	14.0	1.3	15.8
January	558.3	491.4	66.9	29.9	3.0	84.8	3.5	26.9	89.3	101.0	55.0	0.0	15.6	0.0	9.2	2.8	15.0	1.3	15.8
February																			
<u>Coarse Grains</u> 1990/91 1991/92 prel. 1992/93 proj.	819.5	588.8	230.7	24.8	18.4	84.0	13.5	51.4	99.4	111.7	32.6	5.2	1.8	4.1	10.8	24.4	6.8	8.9	9.3
	798.4	579.8	218.6	21.8	17.6	89.9	12.5	64.5	73.1	112.3	26.3	5.3	1.6	3.8	14.3	29.3	7.5	3.4	9.6
	842.5	564.7	277.7	19.6	17.8	81.1	9.0	46.5	88.9	106.9	33.7	5.3	1.6	3.8	13.4	25.8	8.7	8.5	9.1
January	847.9	570.2	277.7	19.6	17.8	81.8	9.0	46.5	91.2	106.9	33.7	5.3	1.6	3.7	14.6	27.8	8.9	8.5	9.1
February																			
<u>Rice (Milled)</u> 1990/91 1991/92 prel. 1992/93 proj.	350.6	345.5	5.1	0.0	0.2	1.6	0.0	0.1	1.4	132.5	74.3	29.4	3.3	11.3	0.3	6.8	0.5	0.0	0.2
	348.3	343.3	5.0	0.0	0.2	1.5	0.0	0.1	1.3	128.7	73.7	29.0	3.2	13.5	0.4	6.9	0.7	0.0	0.1
	351.6	345.9	5.7	0.0	0.2	1.4	0.0	0.1	1.5	129.5	73.0	30.8	2.8	13.3	0.3	7.1	0.7	0.0	0.2
January	351.7	346.0	5.7	0.0	0.2	1.4	0.0	0.1	1.4	129.5	73.0	30.8	2.8	13.1	0.3	7.1	0.7	0.0	0.2
February																			
<u>Total Grains 1/</u> 1990/91 1991/92 prel. 1992/93 proj.	1,758.3	1,448.0	310.3	56.9	22.5	170.3	18.7	92.7	201.1	342.4	156.7	34.6	19.4	15.4	22.0	34.3	22.3	10.6	25.5
	1,689.6	1,412.0	277.6	53.7	21.5	181.4	16.7	102.8	146.7	337.0	155.1	34.3	19.3	17.3	24.6	39.2	18.9	5.6	26.2
	1,750.4	1,400.1	350.4	49.5	21.0	167.3	12.6	73.4	179.3	337.4	161.7	36.1	20.0	17.1	22.2	35.7	23.4	9.8	25.1
January	1,758.0	1,407.7	350.4	49.5	21.0	168.0	12.6	73.4	181.9	337.4	161.7	36.1	20.0	16.8	24.1	37.7	24.6	9.8	25.1
February																			
<u>Oilseeds 2/</u> 1990/91 1991/92 prel. 1992/93 proj.	216.0	155.4	60.6	4.6	1.1	12.9	0.7	4.2	12.8	33.3	20.5	4.2	3.6	0.9	16.8	17.1	1.0	0.9	2.1
	223.8	159.5	64.3	5.8	1.2	13.3	0.7	4.3	11.5	34.2	21.0	4.4	4.7	0.8	15.8	20.8	1.1	0.4	1.7
	225.0	156.3	68.7	5.1	0.7	12.1	0.6	3.7	11.1	31.0	23.5	4.5	4.3	0.7	15.4	21.3	1.0	0.9	2.1
January	224.7	156.0	68.7	5.1	0.7	12.1	0.6	3.7	10.5	31.0	23.3	4.6	3.7	0.7	15.4	22.1	0.9	0.9	2.1
February																			
<u>Cotton</u> 1990/91 1991/92 prel. 1992/93 proj.	87.0	71.5	15.5	0.0	0.8	1.3	0.0	0.1	11.9	20.7	9.1	0.0	7.5	0.1	1.4	3.2	2.0	0.2	3.0
	96.0	78.4	17.6	0.0	0.8	1.4	0.0	0.1	11.3	26.1	9.4	0.0	10.0	0.2	1.1	3.4	2.3	0.1	2.6
	85.7	69.4	16.3	0.0	0.2	1.6	0.0	0.1	9.4	21.0	10.0	0.0	9.0	0.2	0.9	2.8	1.6	0.2	2.8
January	84.1	67.8	16.3	0.0	0.2	1.6	0.0	0.1	9.6	21.0	9.8	0.0	7.5	0.1	0.8	2.8	1.6	0.2	2.8
February																			

—Million 480-pound bales—

1/ Includes wheat, coarse grains, and rice (milled) shown above.

2/ Includes soybean, cottonseed, peanut (in-shell), sunflowerseed, rapeseed, copra, and palm kernel.

Note: Entries of 0.0 indicate no reported or insignificant production.

February 1993

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 3

Wheat Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		From last month		From last year	
	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	MMT	Percent	MMT	Percent
World	Million hectares				Metric tons per hectare				Million metric tons				MMT	Percent	MMT	Percent
	231.44	221.22	220.96	220.92	2.54	2.45	2.52	2.53	588.10	542.85	556.35	558.34	1.99	0.36	15.49	2.85
United States	28.04	23.35	25.26	25.26	2.66	2.31	2.65	2.65	74.47	53.92	66.92	66.92	0.00	0.00	13.00	24.11
Total Foreign	203.40	197.87	195.71	195.66	2.53	2.47	2.50	2.51	513.63	488.94	489.44	491.42	1.99	0.41	2.49	0.51
Major Exporters																
EC-12	45.51	42.70	44.26	44.16	3.14	3.34	3.10	3.14	142.75	142.56	137.17	138.87	1.70	1.24	-3.69	-2.59
France	16.49	16.80	17.03	17.03	5.14	5.36	4.98	4.98	84.68	90.05	84.80	84.80	0.00	0.00	-5.25	-5.83
United Kingdom	5.20	5.20	5.20	5.20	6.46	6.65	6.31	6.31	33.60	34.60	32.80	32.80	0.00	0.00	-1.80	-5.20
Germany	2.05	1.98	2.00	2.00	6.83	7.27	6.85	6.85	14.00	14.40	13.70	13.70	0.00	0.00	-0.70	-4.86
Canada	2.43	2.45	2.61	2.61	6.27	6.77	5.96	5.96	15.24	16.61	15.58	15.58	0.00	0.00	-1.03	-6.20
Australia	14.10	14.16	13.83	13.83	2.28	2.26	2.16	2.16	32.10	31.95	29.87	29.87	0.00	0.00	-2.08	-6.50
Argentina	9.22	7.18	9.10	9.10	1.63	1.49	1.54	1.65	15.07	10.69	14.00	15.00	1.00	7.14	4.31	40.34
	5.70	4.55	4.30	4.20	1.91	2.17	1.98	2.19	10.90	9.88	8.50	9.20	0.70	8.24	-0.68	-6.88
Major Importers																
China	98.46	95.43	92.88	92.98	2.59	2.35	2.49	2.49	255.37	224.60	230.84	231.16	0.32	0.14	6.56	2.92
FSU-12	30.75	30.95	30.65	30.65	3.19	3.10	3.30	3.30	98.23	96.00	101.00	101.00	0.00	0.00	5.00	5.21
Baltic States	47.68	45.59	45.29	45.29	2.10	1.59	1.96	1.97	100.27	72.29	88.95	89.25	0.30	0.34	16.96	23.46
Eastern Europe	0.52	0.37	0.45	0.45	3.12	3.14	1.75	1.75	1.61	1.16	0.78	0.78	0.00	0.00	-0.38	-32.76
Poland	9.76	9.87	8.15	8.15	4.23	3.88	3.30	3.30	41.26	38.26	26.89	26.89	0.00	0.00	-11.37	-29.72
Romania	2.28	2.44	2.41	2.41	3.96	3.80	3.03	3.03	9.03	9.27	7.28	7.28	0.00	0.00	-1.99	-21.48
Hungary	2.25	2.18	1.45	1.45	3.24	2.52	2.28	2.28	7.30	5.49	3.30	3.30	0.00	0.00	-2.19	-39.89
Other N. Africa	1.12	1.15	0.82	0.82	5.50	5.18	4.00	4.00	6.16	5.95	3.26	3.26	0.00	0.00	-2.69	-45.25
Morocco	5.45	5.56	5.15	5.15	1.04	1.55	0.98	0.98	5.67	8.65	5.07	5.07	0.00	0.00	-3.58	-41.40
Egypt	2.72	2.64	2.23	2.23	1.33	1.87	0.70	0.70	3.61	4.94	1.56	1.56	0.00	0.00	-3.38	-68.37
Brazil	0.74	0.76	0.78	0.88	5.79	5.90	5.90	5.26	4.29	4.48	4.60	4.62	0.02	0.37	0.13	3.01
	3.30	2.10	2.20	2.20	0.94	1.43	1.27	1.27	3.10	3.00	2.80	2.80	0.00	0.00	-0.20	-6.67
Other Foreign	59.17	59.50	58.35	58.31	1.94	2.03	2.07	2.07	114.56	121.02	120.66	120.63	-0.03	-0.03	-0.39	-0.32
India	23.50	24.17	22.98	22.98	2.12	2.28	2.39	2.39	49.85	55.13	55.00	55.00	0.00	0.00	-0.13	-0.24
Turkey	8.75	8.80	8.80	8.80	1.83	1.88	1.80	1.80	16.00	16.50	15.80	15.80	0.00	0.00	-0.70	-4.24
Pakistan	7.85	7.91	7.85	7.85	1.84	1.84	1.99	1.99	14.43	14.57	15.60	15.60	0.00	0.00	1.04	7.11
Other W. Europe	0.94	0.79	0.74	0.74	5.56	5.24	4.78	4.78	5.20	4.14	3.53	3.53	0.00	0.00	-0.61	-14.65
Iran	6.50	6.65	7.20	7.20	1.26	1.34	1.39	1.39	8.20	8.90	10.00	10.00	0.00	0.00	1.10	12.36
Mexico	0.95	0.88	0.73	0.73	4.11	4.20	4.14	4.14	3.90	3.70	3.00	3.00	0.00	0.00	-0.70	-18.92
Saudi Arabia	0.71	0.74	0.74	0.74	5.07	5.22	5.54	5.54	3.60	3.86	4.10	4.10	0.00	0.00	0.24	6.19
Rep. of South Africa	1.55	1.43	0.74	0.74	1.10	1.49	1.75	1.71	1.70	2.13	1.30	1.27	-0.03	-2.38	-0.86	-40.48
Others	8.43	8.13	8.57	8.53	1.39	1.49	1.44	1.45	11.68	12.09	12.33	12.33	0.00	0.00	0.24	2.02

TABLE 4

Total Coarse Grain Area, Yield, and Production

World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		From last month		From last year	
	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	MMT	Percent	MMT	Percent
			Million hectares		Metric tons per hectare				Million metric tons							
World	313.56	317.90	319.62	319.66	2.61	2.51	2.64	2.65	819.54	798.44	842.47	847.94	5.48	0.65	49.50	6.20
United States	36.38	37.37	39.05	39.05	6.34	5.85	7.11	7.11	230.74	218.63	277.75	277.75	0.00	0.00	59.11	27.04
Total Foreign	277.18	280.54	280.57	280.61	2.12	2.07	2.01	2.03	588.80	579.81	564.72	570.20	5.48	0.97	-9.61	-1.66
<i>Major Exporters</i>																
Canada	19.92	20.56	20.77	20.71	2.77	2.47	2.60	2.67	55.25	50.78	54.06	55.35	1.29	2.38	4.57	9.00
Argentina	7.33	6.59	6.12	6.12	3.38	3.30	3.21	3.21	24.78	21.78	19.61	19.61	0.00	0.00	-2.17	-9.96
Australia	3.24	3.80	4.13	4.13	3.33	3.76	3.23	3.53	10.77	14.29	13.36	14.56	1.20	8.98	0.28	1.93
Rep. of South Africa	4.12	4.51	4.92	4.90	1.65	1.66	1.77	1.81	6.78	7.47	8.71	8.89	0.18	2.03	1.42	19.04
Thailand	3.69	4.14	4.18	4.18	2.40	0.83	2.05	2.05	8.85	3.45	8.55	8.55	0.00	0.00	5.10	148.13
	1.54	1.52	1.43	1.39	2.64	2.50	2.68	2.69	4.07	3.80	3.83	3.74	-0.09	-2.35	-0.06	-1.58
<i>Major Importers</i>																
FSU-12	99.91	101.61	100.19	100.19	2.72	2.59	2.47	2.50	272.14	263.26	246.97	250.01	3.04	1.23	-13.26	-5.04
Baltic States	51.56	52.13	52.20	52.20	1.93	1.40	1.70	1.75	99.40	73.15	88.89	91.22	2.34	2.63	18.07	24.71
EC-12	1.53	1.74	1.66	1.66	2.57	2.47	1.42	1.42	3.92	4.29	2.36	2.36	0.00	0.00	-1.93	-45.01
Germany	19.24	19.10	18.37	18.37	4.37	4.70	4.42	4.45	84.02	89.87	81.09	81.79	0.70	0.86	-8.08	-8.99
France	4.39	4.11	3.96	3.96	4.95	5.52	4.86	4.86	21.73	22.66	19.26	19.26	0.00	0.00	-3.40	-14.99
Eastern Europe	3.86	4.00	4.15	4.15	5.60	6.45	6.37	6.54	21.61	25.82	26.45	27.15	0.70	2.65	1.33	5.14
Poland	15.90	16.58	16.02	16.02	3.23	3.89	2.90	2.90	51.36	64.45	46.48	46.48	0.00	0.00	-17.98	-27.89
Romania	6.25	6.28	5.92	5.92	3.04	2.95	2.14	2.14	18.99	18.54	12.67	12.67	0.00	0.00	-5.88	-31.69
Czechoslovakia	3.40	3.85	3.75	3.75	2.87	3.58	2.73	2.73	9.79	13.78	10.22	10.22	0.00	0.00	-3.55	-25.79
Mexico	1.14	1.17	1.25	1.25	4.98	4.67	3.75	3.75	5.70	5.49	4.67	4.67	0.00	0.00	-0.82	-14.86
Other W. Europe	8.25	8.84	8.99	8.99	2.23	1.99	1.97	1.97	18.36	17.63	17.75	17.75	0.00	0.00	0.12	0.68
Sweden	3.04	2.85	2.60	2.60	4.45	4.39	3.47	3.47	13.53	12.52	9.02	9.02	0.00	0.00	-3.50	-27.95
	0.93	0.89	0.84	0.84	4.50	4.15	2.81	2.81	4.17	3.69	2.37	2.37	0.00	0.00	-1.33	-35.93
<i>Other Foreign</i>																
China	156.94	158.01	159.25	159.35	1.66	1.67	1.65	1.65	259.86	264.41	262.29	263.45	1.15	0.44	-0.96	-0.36
India	27.01	26.98	26.44	26.44	4.13	4.16	4.04	4.04	111.69	112.28	106.94	106.94	0.00	0.00	-5.34	-4.76
Brazil	36.35	33.77	36.49	36.49	0.90	0.78	0.92	0.92	32.55	26.30	33.65	33.65	0.00	0.00	7.35	27.93
Turkey	13.40	14.10	13.01	13.51	1.82	2.08	1.98	2.06	24.36	29.29	25.78	27.78	2.00	7.76	-1.52	-5.17
Nigeria	4.45	4.45	4.45	4.45	2.10	2.17	2.05	2.05	9.34	9.65	9.15	9.15	0.00	0.00	-0.50	-5.18
Indonesia	9.50	9.50	9.55	9.55	0.67	0.85	0.84	0.84	6.32	8.05	8.05	8.05	0.00	0.00	0.00	0.00
Philippines	2.85	2.90	2.90	2.90	1.82	1.83	1.83	1.83	5.20	5.30	5.30	5.30	0.00	0.00	0.00	0.00
Others	3.86	3.48	3.65	3.39	1.32	1.29	1.33	1.35	5.10	4.49	4.85	4.57	-0.28	-5.77	0.08	1.78
	59.53	62.82	62.76	62.62	1.10	1.10	1.09	1.09	65.30	69.04	68.58	68.02	-0.57	-0.83	-1.03	-1.48

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TABLE 5

Corn Area, Yield, and Production

World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		From last month		From last year	
	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	MMT	Percent	MMT	Percent
World	127.21	130.99	131.74	131.85	3.75	3.70	3.98	3.99	477.17	484.26	524.05	525.97	1.92	0.37	41.70	8.61
United States	27.10	27.86	29.20	29.20	7.44	6.82	8.25	8.25	201.53	189.89	240.78	240.78	0.00	0.00	50.89	26.80
Total Foreign	100.12	103.13	102.54	102.65	2.75	2.85	2.76	2.78	275.64	294.38	283.27	285.19	1.92	0.68	-9.19	-3.12
<i>Major Exporters</i>																
Argentina	6.33	7.20	7.47	7.47	3.11	2.41	2.89	3.03	19.70	17.33	21.60	22.60	1.00	4.63	5.28	30.45
Rep. of South Africa	1.95	2.40	2.70	2.70	3.90	4.42	3.70	4.07	7.60	10.60	10.00	11.00	1.00	10.00	0.40	3.77
Thailand	3.03	3.45	3.50	3.50	2.74	0.91	2.29	2.29	8.30	3.13	8.00	8.00	0.00	0.00	4.88	156.00
	1.35	1.35	1.27	1.27	2.81	2.67	2.83	2.83	3.80	3.60	3.60	3.60	0.00	0.00	0.00	0.00
<i>Major Importers</i>																
Eastern Europe	19.71	21.49	22.05	22.05	3.47	4.01	3.54	3.53	68.34	86.27	78.05	77.79	-0.25	-0.32	-8.47	-9.82
Romania	6.44	6.75	7.01	7.01	3.13	5.00	3.46	3.46	20.14	33.74	24.28	24.28	0.00	0.00	-9.46	-28.03
Yugoslavia	2.47	2.58	3.00	3.00	2.75	4.07	2.83	2.83	6.80	10.50	8.50	8.50	0.00	0.00	-2.00	-19.05
EC-12	2.23	2.17	2.00	2.00	3.02	5.34	3.55	3.55	6.72	11.56	7.10	7.10	0.00	0.00	-4.46	-38.57
France	3.49	3.90	3.83	3.83	6.27	6.85	7.25	7.43	21.87	26.72	27.75	28.45	0.70	2.52	1.74	6.50
Italy	1.60	1.78	1.85	1.85	5.94	7.25	7.35	7.73	9.50	12.90	13.60	14.30	0.70	5.15	1.40	10.85
Mexico	0.77	0.86	0.89	0.89	7.64	7.23	8.54	8.54	5.86	6.21	7.60	7.60	0.00	0.00	1.39	22.46
FSU-12	6.60	7.70	7.90	7.90	2.14	1.88	1.90	1.90	14.10	14.50	15.00	15.00	0.00	0.00	0.50	3.45
Other W. Europe	2.85	2.83	3.01	3.01	3.46	3.19	3.04	2.72	9.86	9.03	9.14	8.19	-0.95	-10.42	-0.84	-9.31
Others 1/	0.23	0.22	0.20	0.20	8.18	8.41	6.89	6.89	1.87	1.81	1.37	1.37	0.00	0.00	-0.44	-24.16
	0.10	0.11	0.11	0.11	4.99	4.54	4.78	4.78	0.50	0.48	0.50	0.50	0.00	0.00	0.02	5.24
<i>Other Foreign</i>																
China	74.08	74.43	73.02	73.13	2.53	2.56	2.51	2.53	187.60	190.78	183.63	184.80	1.17	0.64	-5.99	-3.14
Brazil	21.40	21.57	21.00	21.00	4.52	4.58	4.43	4.43	96.82	98.77	93.00	93.00	0.00	0.00	-5.77	-5.84
India	12.90	13.60	12.50	13.00	1.84	2.10	2.00	2.08	23.70	28.50	25.00	27.00	2.00	8.00	-1.50	-5.26
Canada	5.90	5.78	5.95	5.95	1.52	1.38	1.53	1.53	8.96	8.00	9.10	9.10	0.00	0.00	1.10	13.75
Indonesia	1.06	1.11	0.75	0.75	6.92	6.71	6.67	6.67	7.35	7.41	5.00	5.00	0.00	0.00	-2.41	-32.55
Philippines	2.85	2.90	2.90	2.90	1.82	1.83	1.83	1.83	5.20	5.30	5.30	5.30	0.00	0.00	0.00	0.00
Egypt	3.86	3.48	3.65	3.39	1.32	1.29	1.33	1.35	5.10	4.49	4.85	4.57	-0.28	-5.77	0.08	1.78
Tanzania	0.84	0.69	0.87	0.75	5.47	6.39	5.75	6.00	4.60	4.43	5.00	4.50	-0.50	-10.00	0.07	1.56
Zimbabwe	1.63	1.85	1.90	1.90	1.49	1.24	1.16	1.16	2.43	2.30	2.20	2.20	0.00	0.00	-0.10	-4.35
Others	1.10	0.88	1.20	1.20	1.44	0.41	1.50	1.50	1.59	0.36	1.80	1.80	0.00	0.00	1.44	397.24
	22.53	22.56	22.30	22.29	1.41	1.38	1.45	1.45	31.85	31.22	32.38	32.33	-0.05	-0.15	1.11	3.55

1/ Japan, Republic of Korea, and Taiwan.

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TABLE 6
Barley Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area			Yield			Production			Change in Production						
	1992/93 Proj.			1992/93 Proj.			1992/93 Proj.			From last month		From last year				
	Prel.	1991/92	Jan	Feb	Prel.	1991/92	Jan	Feb	Prel.	1991/92	Jan	Feb	MMT	Percent	MMT	Percent
World	72.00	75.95	72.02	72.02	2.47	2.21	2.22	2.25	177.61	167.53	160.11	162.29	2.18	1.36	-5.24	-3.13
United States	3.05	3.41	2.96	2.96	3.02	2.97	3.36	3.36	9.19	10.11	9.94	9.94	0.00	0.00	-0.17	-1.72
Total Foreign	68.95	72.54	69.06	69.06	2.44	2.17	2.17	2.21	168.42	157.42	150.17	152.35	2.18	1.45	-5.07	-3.22
EC-12	12.33	12.07	11.54	11.54	4.12	4.28	3.76	3.76	50.83	51.65	43.37	43.37	0.00	0.00	-8.28	-16.03
Denmark	0.91	0.94	0.90	0.90	5.48	5.34	3.34	3.34	4.99	5.04	3.02	3.02	0.00	0.00	-2.02	-40.05
France	1.77	1.75	1.80	1.80	5.73	6.17	5.86	5.86	10.15	10.80	10.55	10.55	0.00	0.00	-0.25	-2.31
Germany	2.61	2.54	2.45	2.45	5.35	5.72	5.05	5.05	13.99	14.49	12.34	12.34	0.00	0.00	-2.15	-14.86
Italy	0.47	0.47	0.45	0.45	3.64	3.80	3.78	3.78	1.70	1.77	1.70	1.70	0.00	0.00	-0.07	-4.17
Spain	4.36	4.37	4.02	4.02	2.16	2.09	1.49	1.49	9.41	9.14	5.99	5.99	0.00	0.00	-3.15	-34.43
United Kingdom	1.53	1.39	1.31	1.31	5.17	5.54	5.61	5.61	7.90	7.70	7.35	7.35	0.00	0.00	-0.35	-4.55
FSU-12	25.22	27.47	25.49	25.49	1.98	1.33	1.83	1.91	50.04	36.47	46.77	48.79	2.02	4.32	12.32	33.79
Baltic States	0.97	1.25	1.11	1.11	2.57	2.41	1.54	1.54	2.49	3.02	1.71	1.71	0.00	0.00	-1.31	-43.43
Eastern Europe	3.58	4.01	3.58	3.58	4.02	3.70	3.13	3.13	14.41	14.83	11.18	11.18	0.00	0.00	-3.65	-24.64
Poland	1.17	1.24	1.20	1.20	3.59	3.44	2.37	2.37	4.22	4.26	2.84	2.84	0.00	0.00	-1.42	-33.29
Czechoslovakia	0.75	0.79	0.89	0.89	5.46	4.79	3.99	3.99	4.07	3.79	3.54	3.54	0.00	0.00	-0.25	-6.67
Romania	0.75	1.02	0.49	0.49	3.57	2.89	2.86	2.86	2.68	2.95	1.40	1.40	0.00	0.00	-1.55	-52.54
Canada	4.53	4.22	3.79	3.79	2.97	2.75	2.88	2.88	13.44	11.62	10.92	10.92	0.00	0.00	-0.70	-6.01
Other W. Europe	1.47	1.54	1.35	1.35	4.38	4.19	3.37	3.37	6.44	6.43	4.53	4.53	0.00	0.00	-1.90	-29.51
Finland	0.49	0.54	0.47	0.47	3.54	3.73	2.81	2.81	1.72	2.02	1.33	1.33	0.00	0.00	-0.69	-33.98
Sweden	0.46	0.46	0.42	0.42	4.60	4.21	3.00	3.00	2.12	1.94	1.25	1.25	0.00	0.00	-0.69	-35.40
Turkey	3.40	3.40	3.40	3.40	1.94	2.00	1.82	1.82	6.60	6.80	6.20	6.20	0.00	0.00	-0.60	-8.82
Australia	2.56	2.70	2.96	2.96	1.61	1.66	1.79	1.85	4.11	4.47	5.30	5.47	0.17	3.11	0.99	22.23
China	1.21	1.20	1.25	1.25	3.25	3.27	3.20	3.20	3.93	3.93	4.00	4.00	0.00	0.00	0.07	1.83
Iran	2.65	2.65	2.70	2.70	1.26	1.36	1.44	1.44	3.35	3.60	3.90	3.90	0.00	0.00	0.30	8.33
Morocco	2.42	2.36	2.23	2.23	0.89	1.38	0.48	0.48	2.14	3.25	1.08	1.08	0.00	0.00	-2.17	-66.77
India	0.99	0.96	0.94	0.94	1.50	1.70	1.75	1.75	1.49	1.63	1.65	1.65	0.00	0.00	0.02	1.10
Others	7.62	8.72	8.73	8.73	1.20	1.12	1.10	1.10	9.16	9.72	9.56	9.56	0.00	-0.03	-0.17	-1.70

TABLE 7

Oats Area, Yield, and Production

World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		From last month		From last year	
	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	MMT	Percent	MMT	Percent
	Million hectares				Metric tons per hectare				Million metric tons							
World	20.92	20.25	19.97	19.95	1.87	1.61	1.62	1.68	39.04	32.54	32.31	33.47	1.16	3.59	0.94	2.88
United States	2.41	1.95	1.82	1.82	2.16	1.82	2.35	2.35	5.19	3.53	4.28	4.28	0.00	0.00	0.74	21.00
Total Foreign	18.52	18.31	18.15	18.13	1.83	1.58	1.54	1.61	33.85	29.00	28.04	29.20	1.16	4.13	0.19	0.67
FSU-12	10.36	10.53	10.18	10.18	1.46	1.15	1.27	1.38	15.08	12.14	12.91	14.06	1.15	8.88	1.92	15.79
Baltic States	0.19	0.22	0.20	0.20	2.42	2.02	1.00	1.00	0.47	0.44	0.20	0.20	0.00	0.00	-0.24	-54.85
Maj. Foreign Exporters	2.88	2.68	3.13	3.11	2.17	1.98	1.88	1.90	6.24	5.29	5.90	5.91	0.01	0.20	0.62	11.74
Canada	1.15	0.84	1.24	1.24	2.33	2.13	2.28	2.28	2.69	1.79	2.82	2.82	0.00	0.00	1.03	57.36
Sweden	0.36	0.35	0.34	0.34	4.42	4.13	2.41	2.41	1.58	1.43	0.83	0.83	0.00	0.00	-0.60	-42.15
Australia	1.04	1.14	1.20	1.18	1.47	1.47	1.50	1.54	1.53	1.67	1.80	1.81	0.01	0.67	0.14	8.57
Argentina	0.32	0.35	0.35	0.35	1.34	1.14	1.29	1.29	0.43	0.40	0.45	0.45	0.00	0.00	0.05	12.50
Other Foreign	5.08	4.88	4.64	4.64	2.37	2.28	1.95	1.95	12.07	11.13	9.03	9.03	0.00	0.00	-2.10	-18.87
China	0.58	0.58	0.54	0.54	1.18	1.18	1.19	1.19	0.69	0.69	0.64	0.64	0.00	0.00	-0.05	-6.71
EC-12	1.50	1.38	1.28	1.28	3.13	3.18	2.82	2.82	4.71	4.39	3.62	3.62	0.00	0.00	-0.77	-17.63
France	0.21	0.18	0.17	0.17	3.88	4.23	4.12	4.12	0.83	0.74	0.70	0.70	0.00	0.00	-0.04	-5.41
Germany	0.47	0.38	0.36	0.36	4.45	4.91	3.69	3.69	2.11	1.87	1.32	1.32	0.00	0.00	-0.55	-29.30
Italy	0.16	0.15	0.15	0.15	1.90	2.45	2.42	2.42	0.30	0.36	0.37	0.37	0.00	0.00	0.01	3.35
United Kingdom	0.11	0.10	0.11	0.11	5.19	5.24	5.19	5.19	0.55	0.55	0.55	0.55	0.00	0.00	0.00	0.00
Eastern Europe	1.22	1.20	1.17	1.17	2.70	2.43	1.81	1.81	3.29	2.92	2.13	2.13	0.00	0.00	-0.79	-27.18
Czechoslovakia	0.09	0.09	0.09	0.09	4.53	3.89	3.00	3.00	0.42	0.35	0.26	0.26	0.00	0.00	-0.09	-26.30
Poland	0.75	0.69	0.67	0.67	2.84	2.73	1.86	1.86	2.12	1.87	1.24	1.24	0.00	0.00	-0.63	-33.80
Yugoslavia	0.14	0.13	0.11	0.11	2.01	1.92	1.82	1.82	0.28	0.25	0.20	0.20	0.00	0.00	-0.05	-20.00
Finland	0.45	0.34	0.33	0.33	3.23	3.37	3.02	3.02	1.46	1.16	1.00	1.00	0.00	0.00	-0.16	-13.59
Norway	0.13	0.12	0.11	0.11	4.38	4.60	2.67	2.67	0.57	0.54	0.29	0.29	0.00	0.00	-0.24	-45.35
Turkey	0.15	0.15	0.15	0.15	1.80	1.87	1.87	1.87	0.27	0.28	0.28	0.28	0.00	0.00	0.00	0.00
Brazil	0.20	0.20	0.20	0.20	0.98	1.10	1.10	1.10	0.20	0.22	0.22	0.22	0.00	0.00	0.00	0.00
Others	0.85	0.91	0.85	0.85	1.04	1.03	1.00	1.00	0.89	0.94	0.85	0.85	0.00	0.00	-0.09	-9.15

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Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 8
Rye Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		From last month		From last year	
	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	MMT	Percent	MMT	Percent
World	Million hectares				Metric tons per hectare				Million metric tons							
United States	15.92	13.13	14.95	14.95	2.32	1.97	1.76	1.86	36.86	25.83	26.30	27.77	1.48	5.61	1.94	7.51
Total Foreign	0.15	0.16	0.16	0.16	1.70	1.55	1.85	1.85	0.26	0.25	0.30	0.30	0.00	0.00	0.06	22.58
FSU-12	15.77	12.97	14.79	14.79	2.32	1.97	1.76	1.86	36.60	25.59	25.99	27.47	1.48	5.67	1.88	7.36
Baltic States	10.21	8.26	10.51	10.51	2.08	1.49	1.58	1.72	21.19	12.31	16.56	18.04	1.48	8.90	5.73	46.52
Major Exporter	0.37	0.27	0.35	0.35	2.66	3.11	1.29	1.29	0.97	0.83	0.45	0.45	0.00	0.00	-0.38	-45.52
Canada	0.34	0.18	0.14	0.14	1.76	1.87	1.92	1.92	0.60	0.34	0.27	0.27	0.00	0.00	-0.07	-21.83
Other Foreign	4.86	4.26	3.79	3.79	2.85	2.84	2.30	2.30	13.84	12.11	8.71	8.71	0.00	0.00	-3.39	-28.03
Eastern Europe	2.69	2.62	2.29	2.29	2.67	2.59	1.97	1.97	7.20	6.79	4.53	4.53	0.00	0.00	-2.27	-33.38
Hungary	0.09	0.09	0.07	0.07	2.46	2.38	2.00	2.00	0.23	0.22	0.14	0.14	0.00	0.00	-0.08	-36.65
Poland	2.31	2.29	2.03	2.03	2.61	2.58	1.95	1.95	6.04	5.90	3.97	3.97	0.00	0.00	-1.93	-32.70
Czechoslovakia	0.17	0.13	0.09	0.09	4.30	3.81	2.90	2.90	0.74	0.48	0.26	0.26	0.00	0.00	-0.23	-47.31
EC-12	1.57	1.20	1.09	1.09	3.34	3.68	3.13	3.13	5.25	4.42	3.42	3.42	0.00	0.00	-1.00	-22.67
Denmark	0.11	0.08	0.09	0.09	4.95	4.94	3.62	3.62	0.55	0.40	0.33	0.33	0.00	0.00	-0.06	-15.70
France	0.07	0.07	0.06	0.06	3.69	3.69	3.65	3.65	0.24	0.24	0.23	0.23	0.00	0.00	-0.01	-4.17
Germany	1.06	0.71	0.62	0.62	3.78	4.68	3.92	3.92	3.99	3.32	2.42	2.42	0.00	0.00	-0.90	-27.20
Spain	0.20	0.20	0.19	0.19	1.32	1.23	1.08	1.08	0.27	0.24	0.20	0.20	0.00	0.00	-0.04	-17.36
Other W. Europe	0.25	0.14	0.12	0.12	4.05	4.00	3.84	3.84	1.01	0.57	0.45	0.45	0.00	0.00	-0.12	-21.50
Austria	0.09	0.09	0.07	0.07	4.26	4.12	3.91	3.91	0.40	0.35	0.27	0.27	0.00	0.00	-0.08	-22.86
Sweden	0.07	0.04	0.03	0.03	4.72	3.93	4.13	4.13	0.34	0.17	0.13	0.13	0.00	0.00	-0.04	-22.42
Turkey	0.18	0.17	0.17	0.17	1.33	1.41	1.41	1.41	0.24	0.24	0.24	0.24	0.00	0.00	0.00	0.00
Others	0.16	0.13	0.12	0.12	0.81	0.67	0.68	0.68	0.13	0.08	0.08	0.08	0.00	0.00	0.00	-2.38

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Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 9
Sorghum Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		From last month		From last year	
	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	MMT	Percent	MMT	Percent
	Million hectares				Metric tons per hectare				Million metric tons							
World	38.55	38.17	41.21	41.16	1.36	1.34	1.52	1.52	52.31	51.34	62.59	62.69	0.10	0.15	11.36	22.12
United States	3.68	3.99	4.92	4.92	3.96	3.72	4.57	4.57	14.56	14.86	22.46	22.46	0.00	0.00	7.60	51.15
Total Foreign	34.88	34.18	36.29	36.25	1.08	1.07	1.11	1.11	37.75	36.48	40.14	40.24	0.10	0.24	3.76	10.30
India	14.36	12.59	14.50	14.50	0.81	0.67	0.85	0.85	11.68	8.40	12.30	12.30	0.00	0.00	3.90	46.43
China	1.55	1.40	1.45	1.45	3.67	3.50	3.52	3.52	5.68	4.90	5.10	5.10	0.00	0.00	0.20	4.08
Mexico	1.30	0.82	0.75	0.75	2.85	3.17	2.93	2.93	3.70	2.60	2.20	2.20	0.00	0.00	-0.40	-15.38
Nigeria	4.40	4.40	4.80	4.80	0.64	0.80	0.79	0.79	2.80	3.50	3.80	3.80	0.00	0.00	0.30	8.57
Sudan	3.00	4.40	4.20	4.20	0.50	0.80	0.70	0.70	1.50	3.52	2.94	2.94	0.00	0.00	-0.58	-16.48
Argentina	0.68	0.72	0.75	0.75	3.33	3.61	3.07	3.33	2.25	2.60	2.30	2.50	0.20	8.70	-0.10	-3.85
Australia	0.40	0.53	0.64	0.64	2.22	1.98	2.06	2.06	0.89	1.06	1.32	1.32	0.00	0.00	0.27	25.12
Ethiopia	0.87	0.95	0.90	0.90	1.13	1.05	1.11	1.11	0.98	1.00	1.00	1.00	0.00	0.00	0.00	0.00
Colombia	0.26	0.27	0.25	0.25	2.88	2.87	3.00	3.00	0.74	0.76	0.75	0.75	0.00	0.00	-0.01	-1.32
Venezuela	0.21	0.28	0.28	0.28	2.10	2.23	2.18	2.18	0.44	0.63	0.61	0.61	0.00	0.00	-0.02	-2.40
Egypt	0.13	0.13	0.13	0.13	4.70	4.70	4.69	4.69	0.61	0.62	0.63	0.63	0.00	0.00	0.01	1.45
Yemen	0.61	0.61	0.61	0.61	1.00	1.00	1.00	1.00	0.61	0.61	0.61	0.61	0.00	0.00	0.00	0.00
Tanzania	0.52	0.55	0.65	0.65	0.77	0.95	0.92	0.92	0.40	0.53	0.60	0.60	0.00	0.00	0.07	14.29
Niger	1.30	1.40	1.30	1.30	0.32	0.39	0.35	0.35	0.42	0.55	0.45	0.45	0.00	0.00	-0.10	-18.18
Rep. of South Africa	0.12	0.14	0.13	0.13	2.09	0.74	1.92	1.92	0.24	0.10	0.25	0.25	0.00	0.00	0.15	150.00
Thailand	0.19	0.17	0.16	0.12	1.42	1.18	1.44	1.17	0.27	0.20	0.23	0.14	-0.09	-39.13	-0.06	-30.00
Others	20.33	21.42	21.63	21.63	1.27	1.30	1.28	1.29	25.79	27.88	27.61	27.80	0.19	0.68	-0.08	-0.30

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TABLE 10

Rice Area, Yield, and Production

World and Selected Countries and Regions

Country/Region	Area				Yield				Production (Milled)				Change in Production			
	Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		From last month		From last year	
	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	MMT	Percent	MMT	Percent
	Million hectares				Metric tons per hectare				Million metric tons							
World	147.16	146.30	147.13	147.26	2.38	2.38	2.39	2.39	350.64	348.33	351.59	351.86	0.26	0.08	3.53	1.01
United States	1.14	1.12	1.27	1.27	4.46	4.48	4.49	4.49	5.10	5.04	5.69	5.69	0.00	0.00	0.65	12.93
Total Foreign	146.02	145.18	145.86	146.00	2.37	2.36	2.37	2.37	345.54	343.29	345.91	346.17	0.26	0.08	2.88	0.84
<i>Major Exporters</i>																
Thailand	15.70	16.20	16.29	16.39	1.44	1.49	1.47	1.44	22.56	24.08	23.88	23.68	-0.20	-0.84	-0.40	-1.66
Burma	8.79	9.67	9.75	9.70	1.29	1.39	1.36	1.35	11.35	13.46	13.30	13.10	-0.20	-1.50	-0.36	-2.70
Pakistan	4.80	4.52	4.70	4.86	1.66	1.64	1.66	1.61	7.94	7.42	7.80	7.80	0.00	0.00	0.38	5.06
	2.11	2.01	1.84	1.84	1.54	1.59	1.51	1.51	3.27	3.19	2.78	2.78	0.00	0.00	-0.41	-12.91
<i>Major Importers</i>																
Indonesia	14.08	13.71	14.35	14.35	2.79	2.79	2.78	2.78	39.24	38.29	39.91	39.91	0.00	0.00	1.62	4.23
Rep. of Korea	10.50	10.28	10.90	10.90	2.80	2.82	2.83	2.83	29.37	29.04	30.80	30.80	0.00	0.00	1.76	6.05
EC-12	1.24	1.21	1.20	1.20	4.51	4.45	4.42	4.42	5.61	5.39	5.30	5.30	0.00	0.00	-0.08	-1.58
Iran	0.37	0.37	0.36	0.36	4.31	4.03	4.02	4.02	1.61	1.48	1.44	1.44	0.00	0.00	-0.04	-2.84
	0.61	0.59	0.59	0.59	2.48	2.37	2.27	2.27	1.50	1.39	1.33	1.33	0.00	0.00	-0.06	-4.04
Nigeria	0.65	0.60	0.66	0.66	0.83	0.80	0.82	0.82	0.54	0.48	0.54	0.54	0.00	0.00	0.06	12.50
<i>Other Foreign</i>																
China	115.52	114.60	114.57	114.60	2.45	2.45	2.46	2.46	283.12	280.41	281.62	282.09	0.46	0.16	1.67	0.60
India	33.06	32.59	32.50	32.50	4.01	3.95	3.98	3.98	132.53	128.67	129.50	129.50	0.00	0.00	0.83	0.65
Bangladesh	42.69	42.31	42.00	42.00	1.74	1.74	1.74	1.74	74.29	73.66	73.00	73.00	0.00	0.00	-0.66	-0.90
Vietnam	10.44	10.21	10.30	10.30	1.71	1.81	1.83	1.83	17.85	18.45	18.80	18.80	0.00	0.00	0.35	1.90
Japan	6.27	6.27	6.30	6.30	1.98	2.31	2.20	2.20	12.43	14.45	13.86	13.86	0.00	0.00	-0.59	-4.11
Brazil	2.07	2.05	2.11	2.11	4.61	4.27	4.57	4.57	9.55	8.74	9.65	9.65	0.00	0.00	0.91	10.41
Philippines	4.55	5.00	5.10	5.10	1.49	1.37	1.40	1.40	6.80	6.87	7.14	7.14	0.00	0.00	0.27	3.96
Taiwan	3.43	3.28	3.30	3.30	1.87	1.81	1.79	1.81	6.43	5.93	5.91	5.97	0.06	1.02	0.04	0.62
FSU-12	0.45	0.43	0.43	0.43	3.66	3.90	3.84	3.84	1.66	1.67	1.65	1.65	0.00	0.00	-0.02	-1.37
Colombia	0.61	0.59	0.63	0.65	2.30	2.20	2.37	2.15	1.41	1.30	1.48	1.39	-0.10	-6.67	0.08	6.29
Others	0.44	0.42	0.45	0.45	2.60	2.62	2.67	2.67	1.13	1.10	1.20	1.20	0.00	0.00	0.10	9.09
	11.51	11.45	11.45	11.46	1.65	1.71	1.70	1.74	19.04	19.56	19.43	19.93	0.50	2.59	0.37	1.87

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TABLE 11

Total Oilseed Area, Yield, and Production

World and Selected Countries and Regions

Country/Region	Area			Yield			Production			Change in Production			
	Prel.			Prel.			Prel.			From last month		From last year	
	1990/91	1991/92	1992/93 Proj.	1990/91	1991/92	1992/93 Proj.	1990/91	1991/92	1992/93 Proj.	MMT	Percent	MMT	Percent
World Total	--	--	--	--	--	--	215.99	223.85	224.97	-0.25	-0.11	0.87	0.39
Copra	--	--	--	--	--	--	4.76	4.79	4.47	0.38	8.54	0.07	1.46
Palm Kernel	--	--	--	--	--	--	3.32	3.39	3.62	0.00	0.00	0.23	6.72
<i>World Major Oilseeds 1/</i>	141.27	147.50	145.96	1.47	1.46	1.49	207.91	215.67	216.87	-0.63	-0.29	0.57	0.26
United States	29.13	30.68	29.72	2.08	2.10	2.31	60.55	64.31	68.67	0.00	0.00	4.37	6.79
Total Foreign	112.14	116.83	116.24	1.31	1.30	1.27	147.36	151.36	148.20	-0.63	-0.43	-3.80	-2.51
China	22.27	23.32	23.68	1.50	1.47	1.31	33.33	34.21	30.95	0.00	0.00	-3.26	-9.52
Brazil	11.67	12.57	12.52	1.46	1.65	1.70	17.08	20.79	21.25	0.80	3.76	1.26	6.09
India	25.69	27.74	27.78	0.78	0.74	0.83	20.12	20.55	23.02	-0.20	-0.85	2.27	11.07
Argentina	7.90	8.34	8.02	2.12	1.89	1.92	16.76	15.79	15.38	0.00	0.00	-0.41	-2.60
FSU-12	9.10	8.81	8.64	1.41	1.31	1.28	12.81	11.53	11.08	-0.57	-5.14	-1.02	-8.85
Canada	3.08	3.82	3.52	1.51	1.52	1.44	4.64	5.82	5.05	0.00	0.00	-0.76	-13.15
EC-12	5.76	5.58	5.75	2.25	2.38	2.10	12.93	13.28	12.07	0.00	0.00	-1.21	-9.12
France	1.95	1.81	1.74	2.36	2.72	2.48	4.60	4.92	4.30	0.00	0.00	-0.62	-12.57
Italy	0.71	0.57	0.46	3.09	2.99	2.98	2.20	1.71	1.38	0.00	0.00	-0.33	-19.24
Germany	0.75	1.00	1.07	2.90	3.11	2.61	2.17	3.09	2.79	0.00	0.00	-0.30	-9.83
Spain	1.33	1.16	1.49	1.14	0.91	0.97	1.51	1.07	1.44	0.00	0.00	0.37	34.74
United Kingdom	0.39	0.44	0.42	3.08	2.96	3.00	1.20	1.30	1.26	0.00	0.00	-0.04	-3.08
Indonesia	1.90	1.97	2.04	1.20	1.21	1.21	2.27	2.37	2.46	0.00	0.00	0.09	3.80
Pakistan	3.10	3.35	2.93	1.18	1.42	1.26	3.65	4.74	4.33	-0.65	-15.09	-1.06	-22.35
Eastern Europe	2.34	2.33	2.34	1.81	1.86	1.60	4.24	4.32	3.73	0.00	0.03	-0.59	-13.72
Poland	0.50	0.47	0.42	2.41	2.23	1.88	1.21	1.04	0.79	0.00	0.00	-0.26	-24.74
Romania	0.60	0.59	0.72	1.18	1.35	1.14	0.71	0.80	0.82	0.00	0.12	0.02	2.37
Hungary	0.43	0.42	0.41	1.88	1.99	1.95	0.81	0.84	0.80	0.00	0.00	-0.04	-4.53
Turkey	1.43	1.23	1.41	1.45	1.37	1.47	2.08	1.69	2.07	0.00	0.00	0.39	22.97
Philippines	0.07	0.07	0.08	0.70	0.75	0.72	0.05	0.05	0.06	0.00	0.00	0.00	5.56
Paraguay	1.48	1.42	1.47	1.19	1.05	1.37	1.77	1.50	2.02	0.00	0.00	0.52	35.02
Mexico	0.56	0.67	0.38	1.83	1.64	1.60	1.02	1.10	0.60	0.00	0.00	-0.50	-45.18
Others	15.81	15.61	15.71	0.92	0.87	0.90	14.61	13.63	14.12	-0.02	-0.12	0.47	3.46

1/ Individual countries and regions includes soybean, cottonseed, peanut (in-shell), sunflowerseed, and rapeseed.

TABLE 12
Soybean Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.				Prel.				Prel.				From last month			
	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	MMT	Percent	MMT	Percent
	Million hectares				Metric tons per hectare				Million metric tons							
World	54.27	55.06	56.39	56.48	1.92	1.94	2.01	2.03	104.16	106.69	113.60	114.37	0.78	0.68	7.68	7.20
United States	22.87	23.48	23.63	23.63	2.29	2.30	2.53	2.53	52.42	54.07	59.78	59.78	0.00	0.00	5.71	10.57
Total Foreign	31.40	31.58	32.76	32.85	1.65	1.67	1.64	1.66	51.74	52.63	53.82	54.59	0.78	1.44	1.97	3.74
<i>Major Exporters</i>																
Brazil	15.29	16.00	16.88	16.98	2.96	1.97	1.94	1.98	28.55	31.50	32.80	33.60	0.80	2.44	2.10	6.67
Argentina	9.65	10.30	10.80	10.90	1.63	1.86	1.85	1.91	15.75	19.20	20.00	20.80	0.80	4.00	1.60	8.33
Paraguay	4.75	4.80	5.10	5.10	2.42	2.31	2.20	2.20	11.50	11.10	11.20	11.20	0.00	0.00	0.10	0.90
	0.89	0.90	0.98	0.98	1.46	1.33	1.63	1.63	1.30	1.20	1.60	1.60	0.00	0.00	0.40	33.33
<i>Other Foreign</i>																
China	16.11	15.58	15.88	15.87	1.44	1.36	1.32	1.32	23.19	21.13	21.02	20.99	-0.02	-0.11	-0.13	-0.62
Canada	7.56	7.05	7.20	7.20	1.46	1.38	1.35	1.35	11.00	9.71	9.70	9.70	0.00	0.00	-0.01	-0.10
Eastern Europe	0.48	0.60	0.56	0.56	2.61	2.44	2.32	2.32	1.26	1.46	1.30	1.30	0.00	0.00	-0.16	-10.96
EC-12	0.34	0.23	0.25	0.25	1.06	1.81	1.24	1.24	0.36	0.42	0.31	0.31	0.00	0.00	-0.11	-26.25
India	0.66	0.48	0.43	0.43	3.11	3.13	3.06	3.06	2.07	1.51	1.32	1.32	0.00	0.00	-0.19	-12.86
Indonesia	2.56	2.82	3.00	3.00	1.01	0.82	0.90	0.90	2.60	2.30	2.70	2.70	0.00	0.00	0.40	17.39
FSU-12	1.28	1.33	1.38	1.38	1.10	1.11	1.11	1.11	1.40	1.48	1.53	1.53	0.00	0.00	0.05	3.39
Mexico	0.83	0.81	0.83	0.83	1.06	1.14	1.14	1.14	0.88	0.92	0.94	0.94	0.00	0.00	0.02	2.17
Thailand	0.28	0.33	0.24	0.24	2.05	1.91	1.70	1.70	0.57	0.63	0.40	0.40	0.00	0.00	-0.23	-36.51
Korea, DPR	0.41	0.33	0.34	0.34	1.30	1.27	1.18	1.18	0.53	0.42	0.40	0.40	0.00	0.00	-0.02	-5.21
Japan	0.34	0.34	0.34	0.34	1.29	1.29	1.18	1.18	0.44	0.44	0.40	0.40	0.00	0.00	-0.04	-9.09
Bolivia	0.15	0.14	0.14	0.14	1.51	1.40	1.68	1.68	0.22	0.20	0.24	0.24	0.00	0.00	0.04	19.29
Rep. of Korea	0.19	0.20	0.21	0.21	1.89	1.90	1.90	1.90	0.35	0.38	0.40	0.40	0.00	0.00	0.02	5.26
Colombia	0.15	0.12	0.14	0.14	1.53	1.54	1.50	1.50	0.23	0.18	0.21	0.21	0.00	0.00	0.03	14.75
Others	0.10	0.05	0.05	0.05	1.82	2.00	2.00	2.00	0.19	0.09	0.10	0.10	0.00	0.00	0.01	11.11
	0.78	0.75	0.79	0.77	1.39	1.31	1.38	1.37	1.09	0.99	1.08	1.06	-0.02	-2.13	0.07	6.97

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TABLE 13

Cottonseed Area, Yield, and Production

World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		From last month		From last year	
	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	MMT	Percent	MMT	Percent
	Million hectares				Metric tons per hectare				Million metric tons							
World	32.99	34.95	32.70	32.70	1.02	1.06	1.00	0.98	33.50	36.90	32.80	31.95	-0.85	-2.59	-4.96	-13.43
United States	4.75	5.25	4.51	4.51	1.14	1.20	1.26	1.26	5.42	6.28	5.68	5.68	0.00	0.00	-0.60	-9.53
Total Foreign	28.24	29.71	28.18	28.18	0.99	1.03	0.96	0.93	28.08	30.62	27.11	26.26	-0.85	-3.13	-4.36	-14.24
China	5.59	6.54	6.75	6.75	1.37	1.48	1.16	1.16	7.67	9.66	7.80	7.80	0.00	0.00	-1.86	-19.25
FSU-12	3.17	3.01	2.73	2.73	1.54	1.47	1.34	1.34	4.88	4.44	3.65	3.65	0.00	0.00	-0.78	-17.70
Pakistan	2.66	2.88	2.46	2.46	1.23	1.51	1.59	1.33	3.28	4.36	3.92	3.27	-0.65	-16.68	-1.09	-25.01
India	7.40	7.68	7.48	7.48	0.53	0.52	0.57	0.54	3.90	3.97	4.27	4.08	-0.19	-4.57	0.11	2.64
Brazil	1.92	2.17	1.63	1.63	0.61	0.65	0.67	0.67	1.17	1.42	1.09	1.09	0.00	0.00	-0.34	-23.59
Turkey	0.64	0.60	0.63	0.63	1.61	1.47	1.50	1.50	1.03	0.88	0.95	0.95	0.00	0.00	0.07	7.63
African Franc Zone	1.17	1.21	1.20	1.20	0.76	0.74	0.77	0.77	0.89	0.89	0.92	0.92	0.00	0.00	0.03	3.25
Australia	0.28	0.28	0.25	0.25	2.47	2.66	2.07	2.07	0.69	0.75	0.52	0.52	0.00	0.00	-0.23	-30.71
Egypt	0.42	0.36	0.35	0.35	1.37	1.42	1.36	1.36	0.57	0.51	0.48	0.48	0.00	0.00	-0.03	-5.88
Argentina	0.63	0.58	0.43	0.43	0.78	0.84	0.81	0.81	0.49	0.49	0.35	0.35	0.00	0.00	-0.14	-27.84
Paraguay	0.55	0.48	0.45	0.45	0.78	0.53	0.84	0.84	0.43	0.26	0.38	0.38	0.00	0.00	0.13	49.02
Greece	0.27	0.24	0.30	0.30	1.18	1.34	1.16	1.16	0.31	0.32	0.35	0.35	0.00	0.00	0.03	9.37
Syria	0.16	0.17	0.17	0.17	1.86	2.08	2.08	2.08	0.29	0.35	0.36	0.36	0.00	0.00	0.01	1.69
Mexico	0.19	0.25	0.05	0.05	1.83	1.40	1.70	1.70	0.34	0.35	0.09	0.09	0.00	0.00	-0.26	-75.71
Colombia	0.26	0.25	0.24	0.24	1.10	1.10	1.09	1.09	0.29	0.28	0.26	0.26	0.00	0.00	-0.02	-6.47
Sudan	0.18	0.20	0.20	0.20	1.07	0.96	1.00	1.00	0.19	0.19	0.20	0.20	0.00	0.00	0.01	5.26
Others	2.77	2.81	2.86	2.86	0.60	0.54	0.54	0.54	1.67	1.52	1.54	1.54	0.00	0.00	0.02	1.05

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TABLE 14
Peanut Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.				Prel.				Prel.				From last month			
	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	MMT	Percent	MMT	Percent
World	19.40	19.81	19.45	19.44	1.14	1.12	1.13	1.13	22.21	22.18	22.06	22.06	0.00	-0.01	-0.12	-0.54
United States	0.73	0.82	0.68	0.68	2.23	2.74	2.84	2.84	1.63	2.24	1.94	1.94	0.00	0.00	-0.29	-13.06
Total Foreign	18.66	18.99	18.76	18.76	1.10	1.05	1.07	1.07	20.57	19.94	20.12	20.11	0.00	-0.01	0.17	0.86
India	8.31	8.67	8.50	8.50	0.90	0.82	0.98	0.98	7.51	7.10	8.30	8.30	0.00	0.00	1.20	16.90
China	2.91	2.88	2.95	2.95	2.19	2.19	1.80	1.80	6.37	6.30	5.30	5.30	0.00	0.00	-1.00	-15.87
Indonesia	0.60	0.62	0.64	0.64	1.43	1.45	1.45	1.45	0.86	0.89	0.93	0.93	0.00	0.00	0.04	4.49
Senegal	0.91	0.87	0.88	0.88	0.77	0.83	0.82	0.82	0.70	0.72	0.73	0.73	0.00	0.00	0.00	0.14
Burma	0.55	0.54	0.49	0.49	0.86	0.81	0.86	0.86	0.47	0.44	0.42	0.42	0.00	0.00	-0.02	-4.55
Argentina	0.22	0.16	0.09	0.09	2.61	2.50	2.50	2.50	0.57	0.40	0.23	0.23	0.00	0.00	-0.18	-43.75
Sudan	0.54	0.53	0.55	0.55	0.60	0.75	0.71	0.71	0.33	0.40	0.39	0.39	0.00	0.00	-0.01	-2.50
Zaire	0.53	0.53	0.53	0.53	0.72	0.72	0.72	0.72	0.38	0.38	0.38	0.38	0.00	0.00	0.00	0.00
Nigeria	0.50	0.48	0.50	0.50	0.50	0.46	0.50	0.50	0.25	0.22	0.25	0.25	0.00	0.00	0.03	13.64
Vietnam	0.30	0.30	0.30	0.30	0.98	0.98	0.98	0.98	0.30	0.30	0.30	0.30	0.00	0.00	0.00	0.00
Rep. of South Africa	0.09	0.20	0.10	0.10	1.30	0.57	1.30	1.30	0.11	0.12	0.13	0.13	0.00	0.00	0.01	12.07
Brazil	0.10	0.10	0.09	0.09	1.65	1.68	1.78	1.78	0.16	0.16	0.16	0.16	0.00	0.00	0.00	0.00
Thailand	0.12	0.12	0.12	0.12	1.33	1.31	1.32	1.32	0.16	0.16	0.16	0.16	0.00	0.00	0.00	1.25
Burkina Faso	0.22	0.23	0.23	0.23	0.68	0.69	0.69	0.69	0.15	0.16	0.16	0.16	0.00	0.00	0.00	0.00
Central African Rep.	0.13	0.13	0.13	0.13	1.08	1.12	1.12	1.12	0.14	0.15	0.15	0.15	0.00	0.00	0.00	0.00
Cameroon	0.32	0.32	0.32	0.32	0.44	0.44	0.44	0.44	0.14	0.14	0.14	0.14	0.00	0.00	0.00	0.00
Cote d' Ivoire	0.15	0.15	0.15	0.15	0.97	0.97	0.98	0.98	0.15	0.15	0.15	0.15	0.00	0.00	0.00	1.35
Gambia	0.08	0.10	0.10	0.10	0.94	1.26	1.26	1.26	0.08	0.12	0.12	0.12	0.00	0.00	0.00	0.00
Uganda	0.14	0.14	0.14	0.14	0.79	0.79	0.79	0.79	0.11	0.11	0.11	0.11	0.00	0.00	0.00	0.00
Others	1.96	1.93	1.96	1.95	0.84	0.80	0.83	0.83	1.64	1.54	1.63	1.63	0.00	-0.18	0.09	5.72

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TABLE 15

Sunflowerseed Area, Yield, and Production

World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.				Prel.				Prel.				From last month			
	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	MMT	Percent	MMT	Percent
World	16.36	17.11	17.24	17.24	1.40	1.25	1.28	1.24	22.85	21.39	22.03	21.45	-0.58	-2.62	0.06	0.26
United States	0.75	1.08	0.84	0.84	1.38	1.51	1.41	1.41	1.03	1.64	1.18	1.18	0.00	0.00	-0.46	-27.94
Total Foreign	15.61	16.02	16.41	16.40	1.40	1.23	1.27	1.24	21.82	19.76	20.85	20.27	-0.58	-2.77	0.51	2.60
FSU-12	4.67	4.50	4.60	4.60	1.41	1.25	1.33	1.20	6.56	5.64	6.10	5.53	-0.57	-9.34	-0.11	-1.95
Argentina	2.30	2.80	2.40	2.40	1.83	1.36	1.50	1.50	4.20	3.80	3.60	3.60	0.00	0.00	-0.20	-5.26
EC-12	2.61	2.35	2.63	2.63	1.64	1.69	1.56	1.56	4.26	3.97	4.10	4.10	0.00	0.00	0.12	3.07
France	1.14	1.03	1.01	1.01	2.12	2.47	2.31	2.31	2.42	2.54	2.33	2.33	0.00	0.00	-0.21	-8.27
Spain	1.20	1.07	1.40	1.40	1.08	0.84	0.93	0.93	1.30	0.90	1.30	1.30	0.00	0.00	0.40	44.44
Italy	0.17	0.15	0.09	0.09	2.33	2.38	2.22	2.22	0.40	0.35	0.20	0.20	0.00	0.00	-0.15	-42.53
Eastern Europe	1.23	1.34	1.42	1.42	1.71	1.69	1.51	1.51	2.10	2.26	2.15	2.15	0.00	0.00	-0.11	-5.04
Hungary	0.35	0.35	0.35	0.35	1.95	2.00	2.00	2.00	0.67	0.70	0.70	0.70	0.00	0.00	0.00	0.00
Romania	0.40	0.48	0.57	0.57	1.41	1.28	1.19	1.19	0.56	0.61	0.68	0.68	0.00	0.00	0.07	11.11
Yugoslavia	0.21	0.19	0.18	0.18	1.97	2.00	1.81	1.81	0.42	0.38	0.33	0.33	0.00	0.00	-0.06	-14.47
Bulgaria	0.24	0.27	0.27	0.27	1.57	1.64	1.22	1.22	0.37	0.44	0.33	0.33	0.00	0.00	-0.11	-25.34
Czechoslovakia	0.03	0.06	0.05	0.05	2.32	2.32	2.30	2.30	0.08	0.13	0.12	0.12	0.00	0.00	-0.02	-11.54
China	0.71	0.75	0.73	0.73	1.88	1.47	1.45	1.45	1.34	1.10	1.05	1.05	0.00	0.00	-0.05	-4.55
Turkey	0.70	0.55	0.70	0.70	1.23	1.18	1.40	1.40	0.86	0.65	0.98	0.98	0.00	0.00	0.33	50.77
India	1.63	2.10	2.20	2.20	0.53	0.56	0.59	0.59	0.87	1.18	1.30	1.30	0.00	0.00	0.12	10.17
Rep. of South Africa	0.58	0.45	0.50	0.50	1.02	0.38	1.05	1.05	0.59	0.17	0.53	0.53	0.00	0.00	0.35	203.47
Australia	0.17	0.09	0.15	0.14	0.90	1.02	0.97	0.94	0.15	0.09	0.14	0.13	-0.01	-5.71	0.04	46.67
Burma	0.15	0.18	0.17	0.17	0.64	0.60	0.64	0.64	0.10	0.11	0.11	0.11	0.00	0.00	0.00	2.83
Others	0.88	0.92	0.91	0.91	0.89	0.85	0.87	0.87	0.78	0.78	0.80	0.80	0.00	0.00	0.02	2.44

February 1993

Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 16
Rapeseed Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		Prel.		1992/93 Proj.		From last month		From last year	
	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	1990/91	1991/92	Jan	Feb	MMT	Percent	MMT	Percent
	Million hectares				Metric tons per hectare				Million metric tons							
World	18.26	20.59	20.19	20.19	1.38	1.38	1.31	1.31	25.21	28.51	26.40	26.41	0.02	0.07	-2.10	-7.36
United States	0.03	0.07	0.06	0.06	1.74	1.42	1.55	1.55	0.05	0.09	0.09	0.09	0.00	0.00	-0.01	-9.57
Total Foreign	18.23	20.52	20.13	20.13	1.38	1.38	1.31	1.31	25.15	28.42	26.31	26.33	0.02	0.07	-2.09	-7.36
India	5.78	6.47	6.60	6.60	0.90	0.93	0.98	0.98	5.23	6.00	6.45	6.45	0.00	0.00	0.45	7.50
China	5.50	6.10	6.05	6.05	1.26	1.22	1.17	1.17	6.96	7.44	7.10	7.10	0.00	0.00	-0.34	-4.52
Canada	2.53	3.14	2.90	2.90	1.29	1.34	1.27	1.27	3.27	4.22	3.69	3.69	0.00	0.00	-0.54	-12.67
EC-12	2.13	2.43	2.33	2.33	2.88	3.02	2.68	2.68	6.15	7.34	6.22	6.22	0.00	0.00	-1.12	-15.25
France	0.69	0.72	0.68	0.68	2.80	3.11	2.75	2.75	1.94	2.23	1.86	1.86	0.00	0.00	-0.37	-16.41
Germany	0.72	0.95	1.00	1.00	2.90	3.13	2.59	2.59	2.09	2.97	2.59	2.59	0.00	0.00	-0.38	-12.88
United Kingdom	0.39	0.44	0.42	0.42	3.08	2.96	3.00	3.00	1.20	1.30	1.26	1.26	0.00	0.00	-0.04	-3.08
Denmark	0.27	0.28	0.18	0.18	2.94	2.59	2.22	2.22	0.79	0.73	0.40	0.40	0.00	0.00	-0.33	-44.90
Eastern Europe	0.74	0.71	0.63	0.63	2.39	2.29	1.99	2.00	1.76	1.62	1.25	1.26	0.00	0.08	-0.37	-22.72
Poland	0.50	0.47	0.42	0.42	2.41	2.23	1.88	1.88	1.21	1.04	0.79	0.79	0.00	0.00	-0.26	-24.74
Czechoslovakia	0.14	0.17	0.15	0.15	2.77	2.70	2.52	2.52	0.38	0.45	0.38	0.38	0.00	0.00	-0.07	-15.73
FSU-12	0.44	0.49	0.48	0.48	1.12	1.10	0.81	0.81	0.49	0.53	0.39	0.39	0.00	0.00	-0.14	-26.97
Sweden	0.16	0.15	0.13	0.13	2.25	1.74	1.43	1.43	0.37	0.25	0.18	0.18	0.00	0.00	-0.07	-28.57
Pakistan	0.30	0.32	0.32	0.32	0.75	0.69	0.76	0.76	0.23	0.22	0.24	0.24	0.00	0.00	0.02	10.96
Bangladesh	0.35	0.35	0.35	0.35	0.66	0.66	0.66	0.66	0.23	0.23	0.23	0.23	0.00	0.00	0.00	0.00
Finland	0.07	0.06	0.07	0.07	1.91	1.72	1.80	1.80	0.12	0.11	0.12	0.12	0.00	0.00	0.01	13.33
Others	0.23	0.31	0.28	0.28	1.53	1.47	1.52	1.58	0.36	0.45	0.43	0.45	0.02	3.93	0.00	-0.66

February 1993

Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 17
Copra, Palm Kernel, and Palm Oil Production
World and Selected Countries and Regions

Country/Region	Production				Change in Production			
	Prel.		1992/93 Proj.		From last month		From last year	
	1990/91	1991/92	Jan	Feb				
	Million metric tons				MMT	Percent	MMT	Percent
<u>COPRA</u>								
World	4.76	4.79	4.47	4.86	0.38	8.54	0.07	1.46
Philippines	2.01	1.97	1.73	2.02	0.29	16.61	0.05	2.54
Indonesia	1.31	1.38	1.30	1.39	0.09	7.34	0.01	1.09
India	0.40	0.45	0.45	0.45	0.00	0.00	0.00	0.00
Mexico	0.13	0.15	0.15	0.15	0.00	0.00	0.00	-0.68
Sri Lanka	0.13	0.06	0.08	0.08	0.00	0.00	0.02	31.15
Vietnam	0.13	0.13	0.13	0.13	0.00	0.00	0.00	0.00
Malaysia	0.08	0.09	0.09	0.09	0.00	0.00	0.00	-5.56
Others	0.58	0.57	0.56	0.56	0.00	0.00	-0.01	-1.41
<u>PALM KERNEL</u>								
World	3.32	3.39	3.62	3.62	0.00	0.00	0.23	6.72
Malaysia	1.77	1.81	1.97	1.97	0.00	0.00	0.16	8.96
Indonesia	0.66	0.66	0.71	0.71	0.00	0.00	0.04	6.82
Nigeria	0.26	0.27	0.28	0.28	0.00	0.00	0.01	3.70
Cote d' Ivoire	0.06	0.06	0.06	0.06	0.00	0.00	0.00	3.57
Colombia	0.05	0.06	0.06	0.06	0.00	0.00	0.00	9.09
Thailand	0.04	0.05	0.05	0.05	0.00	0.00	0.00	0.00
Zaire	0.03	0.03	0.03	0.03	0.00	0.00	0.00	0.00
Ecuador	0.02	0.02	0.02	0.02	0.00	0.00	0.00	0.00
Others	0.43	0.44	0.45	0.45	0.00	0.00	0.00	0.90
<u>PALM OIL</u>								
World	11.09	11.45	12.29	12.29	0.00	0.00	0.84	7.35
Malaysia	6.03	6.22	6.65	6.65	0.00	0.00	0.43	6.88
Indonesia	2.65	2.75	3.15	3.15	0.00	0.00	0.40	14.55
Nigeria	0.60	0.63	0.60	0.60	0.00	0.00	-0.03	-4.76
Cote d' Ivoire	0.28	0.28	0.29	0.29	0.00	0.00	0.00	1.42
Colombia	0.25	0.26	0.27	0.27	0.00	0.00	0.00	1.53
Thailand	0.20	0.22	0.24	0.24	0.00	0.00	0.02	7.73
Zaire	0.12	0.11	0.11	0.11	0.00	0.00	0.00	0.00
Ecuador	0.12	0.13	0.13	0.13	0.00	0.00	0.00	1.54
Others	0.84	0.85	0.86	0.86	0.00	0.00	0.02	2.01

February 1993

Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 18
Cotton Area, Yield, and Production
World and Selected Countries and Regions

Country/Region	Area				Yield				Production				Change in Production			
	1990/91		1991/92		1990/91		1991/92		1990/91		1991/92		1990/91		1991/92	
	Prel.	1992/93 Proj.	Jan	Feb	Prel.	1992/93 Proj.	Jan	Feb	Prel.	1992/93 Proj.	Jan	Feb	From Last Month	From Last Year	From Last Month	From Last Year
	Million hectares				Kilograms per hectare				Million 480 lb. bales				MBales		Percent	
World	33.03	34.79	32.64	32.60	573	601	572	562	86.98	95.98	85.71	84.10	-1.61	-1.88	-11.88	-12.38
United States	4.75	5.25	4.51	4.51	711	731	784	784	15.51	17.61	16.26	16.26	0.00	0.00	-1.35	-7.69
Total Foreign	28.29	29.55	28.12	28.08	550	577	538	526	71.48	78.36	69.45	67.84	-1.61	-2.32	-10.53	-13.43
<i>Major Exporters</i>																
China	17.28	18.11	17.05	17.02	695	742	674	658	55.13	61.74	52.80	51.41	-1.39	-2.63	-10.33	-16.73
Pakistan	5.59	6.54	6.75	6.75	807	869	677	677	20.70	26.10	21.00	21.00	0.00	0.00	-5.10	-19.54
Sudan	2.66	2.88	2.46	2.46	615	756	797	664	7.52	10.00	9.00	7.50	-1.50	-16.67	-2.50	-25.00
Turkey	0.20	0.19	0.19	0.19	422	494	463	463	0.38	0.42	0.40	0.40	0.00	0.00	-0.02	-4.76
FSU-12	0.64	0.60	0.63	0.63	1021	937	961	957	3.01	2.58	2.78	2.78	0.00	0.07	0.20	7.91
Egypt	3.17	3.01	2.74	2.85	818	814	747	733	11.91	11.25	9.40	9.60	0.20	2.13	-1.65	-14.67
African Franc Zone	0.42	0.36	0.35	0.35	719	814	925	987	1.38	1.34	1.50	1.60	0.10	6.67	0.26	19.58
Southern Hemisphere	1.17	1.23	1.20	1.18	457	438	458	466	2.46	2.47	2.52	2.53	0.01	0.40	0.06	2.30
Argentina	3.44	3.31	2.73	2.60	493	499	494	502	7.78	7.59	6.20	6.00	-0.20	-3.23	-1.59	-20.90
Australia	0.63	0.58	0.43	0.40	468	431	456	435	1.36	1.15	0.90	0.80	-0.10	-11.11	-0.35	-30.31
Brazil	0.28	0.28	0.25	0.25	1552	1770	1388	1388	1.99	2.29	1.60	1.60	0.00	0.00	-0.69	-30.19
Paraguay	1.98	1.97	1.60	1.60	354	381	381	381	3.22	3.45	2.80	2.80	0.00	0.00	-0.65	-18.72
	0.55	0.48	0.45	0.35	482	318	435	498	1.22	0.70	0.90	0.80	-0.10	-11.11	0.10	14.29
<i>Major Importers</i>																
	0.48	0.44	0.50	0.49	731	825	798	801	1.62	1.66	1.84	1.82	-0.02	-1.30	0.16	9.72
<i>Other Foreign</i>																
India	10.52	11.00	10.57	10.57	305	296	305	301	14.72	14.96	14.81	14.61	-0.20	-1.35	-0.36	-2.38
Others	7.40	7.68	7.48	7.48	269	265	291	285	9.14	9.37	10.00	9.80	-0.20	-2.00	0.43	4.59
	3.12	3.32	3.09	3.09	390	367	339	339	5.59	5.59	4.81	4.81	0.00	0.00	-0.79	-14.06

TABLE 19

The table below presents a 11-year record of the difference between the February projections and the final estimates. Using world wheat production as an example, changes between the February projection and the final estimate have averaged 2.8 million tons (0.6 percent) and ranged from -7.3 to 6.8 million tons. The February projection has been below the final 8 times and above the final 3 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 – 1991/92 1/					
	Difference		Lowest	Highest	Below Final	Above Final
	Average	Average	Difference			
	Percent	---Million metric tons---			Number of years 2/	
<i>WHEAT</i>						
World	0.6	2.8	-7.3	6.8	8	3
U.S.	0.1	0.0	-0.1	0.1	5	2
Foreign	0.7	2.8	-7.3	6.8	8	3
<i>COARSE GRAINS 3/</i>						
World	0.6	4.5	-11.1	5.1	7	4
U.S.	0.1	0.2	-0.2	1.3	8	1
Foreign	0.8	4.6	-11.0	5.1	5	6
<i>RICE (Milled)</i>						
World	1.6	4.9	-13.0	1.8	9	2
U.S.	1.3	0.1	-0.2	0.1	5	1
Foreign	1.6	4.9	-13.0	1.8	9	2
<i>SOYBEANS</i>						
World	1.6	1.5	-2.3	2.1	6	5
U.S.	1.0	0.5	-1.1	1.8	4	5
Foreign	3.1	1.3	-2.2	2.2	8	3
		---Million 480-lb. bales---				
<i>COTTON</i>						
World	1.9	1.6	-5.4	2.8	8	3
U.S.	0.7	0.1	-0.1	0.3	3	7
Foreign	2.4	1.7	-5.7	2.7	8	3
<i>UNITED STATES</i>		-----Million bushels-----				
<i>CORN</i>	0.4	31	-148	38	4	1
<i>SORGHUM</i>	0.8	7	-53	14	1	3
<i>BARLEY</i>	0.5	2	-3	11	6	1
<i>OATS</i>	0.1	0	-2	0	3	0

1/ The final estimate for 1981/82-1990/91 is defined as the first November estimate following the marketing year.

2/ May not total 11 if projection was the same as the final.

3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

February 1993

Production Estimates and Crop Assessment Division, FAS, USDA

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

FEBRUARY 10, 1993



1 - UNITED STATES

Late-harvest progress slowed by wet soils, and snow in many areas. Flooding damaged some crops in desert Southwest but snow pack improved significantly from California to the southern Rockies. Snow cover protected northern winter wheat areas.

2 - SOUTH AMERICA

Widespread rain and seasonable temperatures favored Brazilian soybeans. However, additional moisture is still needed in some areas for adequate reproduction. In Argentina, mostly favorable harvest weather existed for winter wheat and summer crops have adequate to abundant soil moisture.

3 - EUROPE

Well below normal January rainfall stressed winter crops in Spain and hampered soil moisture recharge across most of the Mediterranean region. Near to above normal precipitation boosted moisture reserves for dormant winter grains across the north. Unseasonably mild weather prevailed in late January, but colder air returned in February.

4 - FSU: WEST

Unusually mild January weather favored dormant winter grains but caused crops to lose winter hardiness. The second consecutive month of dryness in Ukraine limits moisture recharge.

5 - SOUTH AFRICA

Late-January showers and cooler temperatures brought relief to reproductive-filling corn in drought-stricken western areas. Eastern crop areas continued to do better than last year, except for Natal's grain and sugarcane.

6 - SOUTH ASIA

Dry, mostly cooler-than-normal conditions during January slowed vegetative growth of winter grains and oilseeds. Early February's warmer weather increases irrigation demands.

7 - EASTERN ASIA

Above to much above normal rains during January favored reservoir levels across central and southern China. Cool weather prevailed during the month keeping winter wheat dormant, but possibly stressing southern winter vegetables. However, recent warm temperatures may have caused wheat to lose some winter hardiness.

8 - SOUTHEAST ASIA

Frequent showers over Java maintain irrigation reserves but cause some flooding. A drying trend developed over Malaysia's primary rice and oil palm areas. Heavy rain over the southern Philippines improves moisture for rice planting.

9 - AUSTRALIA

Rains during early January, continued to cause winter wheat harvest delays, but drier weather later in the month favored harvesting. Dry, hot weather stressed summer crops in southern Queensland, while conditions were somewhat better (hot, but not as dry) in northern New South Wales. Near normal rain fell across Queensland's sugarcane region.

10 - NORTHWESTERN AFRICA

Recent rain brings temporary relief to drought-stressed winter grains in Morocco. Moisture is becoming limited for crops in Algeria and Tunisia.

(More details are available in the Weekly Weather and Crop Bulletin. Subscription information may be obtained by calling (202) 720-7917.)

WEATHER BRIEFS

SOUTH AFRICA: SUMMER CROPS BENEFIT FROM RECENT RAINS

In early January, soil moisture was becoming critically short for the maintenance of adequate corn growth across the western and central Orange Free State and southwestern Transvaal. However, from January 24 through February 10, precipitation was frequent and widespread across the Maize Triangle. This precipitation did much to maintain favorable growing conditions across the southeastern Transvaal and eastern Orange Free State and temporarily improved growing conditions. By early February, corn was in the moisture-critical reproductive-to-filling stages. More rain is needed to prevent yield losses. Moderate rainfall from January 24 - 30, and February 7 - 10, greatly improved summer crop conditions in Lesotho, Natal, and northeastern Cape Province.

FORMER SOVIET UNION: WINTER GRAIN FAVORED BY MILD WINTER

For the sixth consecutive winter, temperatures have been relatively mild across the major winter grain growing areas of the western Former Soviet Union. Temperatures mostly were above normal from January 1 through February 10, 1993 and were seasonally cold only during the short period of January 29 - 31. Winter grains in the coldest areas had protective snow cover during this time. Mild and above-freezing temperatures during the remainder of January and early February caused snow cover to diminish across much of Ukraine and caused some loss of winter wheat hardiness. This lack of protective snow cover and loss of hardiness leaves winter grains in Ukraine vulnerable to potential freeze damage if unseasonably cold weather reaches that region. Precipitation across the western FSU from January 1 through February 10, 1993 has been near normal across the Baltics, Belarus, the Central Region, and the central Black Soils region, above normal across the North Caucasus, and below normal across the southern two-thirds of Ukraine. Precipitation across Ukraine has been below normal since early December.

NORTHWEST AFRICA: RAINFALL REMAINS BELOW NORMAL

Rainfall from January 12 through February 10, 1993 across Morocco and western Algeria's winter grain growing areas continued to be below normal and below last year's level. Precipitation had been below normal and insufficient to allow for uniform winter grain planting and emergence since October 1. Moderate rain fell across Morocco's winter grains areas from January 30 through February 6, bringing relief to drought-stressed grains in the vegetative stage. Rainfall was heaviest in the southern crop area. Western Algeria remained critically dry during January and early February. Dryness developed across eastern Algeria and Tunisia where no rain fell from January 12 through February 8. However, light-to-moderate rain brought some relief to Tunisian crops on February 9. Soil moisture reserves across Northwest Africa are short and more rainfall will be needed as winter grains enter their reproductive and filling stages next month.

PRODUCTION BRIEFS

BRAZIL: SAO PAULO ORANGE CROP FORECAST HIGHER BY INDUSTRY

A preliminary forecast by the leading Brazilian citrus processors pegs the 1993 (USDA year 1992/93) Sao Paulo orange crop at 292.8 million 40.8-kilogram boxes. If realized, this would be a slight increase over the 1992 crop currently estimated by the USDA at 290.0 million 40.8-kilogram boxes. The processors estimated the number of bearing trees at 138.0 million, a 17-percent increase from 1992. However, the average yield per tree is forecast to decline due to disease problems and excessive rainfall during the flowering and fruit-setting stages. Sao Paulo accounted for approximately 84 percent of Brazil's orange production in 1992. Note that the new crop forecast was released by representatives of Sao Paulo's frozen concentrated orange juice industry and is not an official USDA forecast.

CHINA: FRUIT PRODUCTION CONTINUES TO INCREASE

Chinese fruit production totaled 21.8 million tons in 1991, a 17-percent increase over 1990, according to the U.S. agricultural counselor in Beijing. Production expanded another 12 percent in 1992, to 24.4 million tons. Citrus, apples, and pears are China's principal fruit crops, accounting for 29, 21, and 11 percent, respectively, of production in 1991. Although apple and pear production expanded in 1992, citrus production declined 23 percent because of cold temperatures during early 1992.

The upward trend in China's fruit production is expected to continue as farmers look for ways to supplement their incomes in an increasingly market-oriented economy. Fruits are now marketed freely and farmers may negotiate their own contracts. As the returns on fruit production have increased, so has input use. Production growth reflects improved orchard management, an increase in the use of fertilizers, and the introduction of new species rather than a marked increase in area.

Most fruit production is carried out by contracted units. The contractors provide rootstock, seedlings, training, and technical services. Contracts are determined by market forces, rather than government-set prices.

Although farmers now are free to market their own fruit, the Supply and Marketing Cooperatives, once the only domestic procurers of fruit, continue to play a major role by providing technical services. For example, a nursery established in cooperation with the Ministry of Commerce supplies farmers with 2.0 million apple trees each year. A nursery for citrus is planned for southern China. At present, the Cooperatives are developing an integrated marketing system covering production, packaging, marketing, and sales. In addition, some experimentation with organically grown, or "green fruit," is currently underway.

Shandong Province is China's leading producer of deciduous fruit. Shandong's 1992 fruit harvest totaled 3.0 million tons. Apples accounted for 56 percent of this total, up from only 3 percent in the 1950's. The Red Fuji apple, introduced from Japan in 1980, now ranks as the number one variety produced in Shandong. Approximately 31 percent of Shandong's 430,000 hectares of apple orchards are Red Fuji stands. Other major varieties include Red Delicious (Red Star), Ralls, and Golden Delicious.

CHINA: FRUIT PRODUCTION
(Million Metric tons)

	<u>1987</u>	<u>1988</u>	<u>1989</u>	<u>1990</u>	<u>1991</u>	<u>1992</u> <u>1/</u>
Apples	4.3	4.3	4.5	4.3	4.5	4.8
Pears	2.0	1.8	1.4	1.5	2.5	NA
Citrus	3.2	2.6	4.6	4.9	6.3	4.9
Bananas	2.0	1.8	1.4	1.5	2.0	NA
Grapes	0.6	0.8	0.9	0.9	0.9	NA
Total <u>2/</u>	16.7	16.7	18.3	18.7	21.8	24.4

1/ Forecast.

2/ Includes all fruit; only top 5 categories listed separately.

SOURCE: State Statistical Bureau

CHINA: FRUIT PRODUCTION BY PROVINCE - 1991
(1,000 Metric tons)

	Total <u>1/</u>	Apples	Pears	Citrus	Bananas	Grapes
Guangdong	3,942	---	15	1,757	1,366	---
Shandong	2,816	1,627	344	---	---	132
Hebei	1,970	531	814	---	---	100
Sichuan	1,472	67	119	1,031	---	---
Zhejiang	1,345	---	27	1,064	---	24
Guangxi	1,139	---	25	389	310	---
Fujian	1,105	---	15	584	189	4
Liaoning	1,011	571	204	---	---	90
Xinjiang	811	120	72	---	---	356
Shaanxi	801	505	36	16	---	18
Henan	637	380	31	2	---	24
Total <u>2/</u>	21,761	4,540	2,498	6,333	1,981	916

1/ Includes pineapple, date, persimmon, longan, and litchi production among others.

2/ Totals include provinces not shown separately. Provinces listed separately include the top 3 producers of each fruit listed.

SOURCE: Agricultural Yearbook, China, 1992.

CHINA: FRUIT PRODUCTION AND ORCHARD AREA BY PROVINCE: 1989-1991

	TOTAL FRUIT PRODUCTION (1,000 Metric tons)			ORCHARD AREA (1,000 Hectares)		
	1989	1990	1991	1989	1990	1991
Guangdong	2,758	3,285	3,942	639	645	658
Shandong	2,559	2,463	2,816	669	641	613
Hebei	1,854	1,755	1,971	831	627	601
Sichuan	1,247	1,270	1,472	226	238	240
Zhejiang	988	1,070	1,345	223	222	226
Guangxi	749	916	1,139	133	154	188
Fujian	699	758	1,105	278	298	355
Liaoning	1,003	1,113	1,011	398	390	390
Xinjiang	733	798	811	130	130	125
Shaanxi	543	620	801	289	305	334
Henan	767	639	637	302	234	215
Total <u>1/</u>	18,319	18,744	21,761	5,372	5,179	5,318

1/ Totals shown are for all provinces, including those not shown separately.

SOURCE: Agricultural Yearbook, China, 1992.

FRANCE: WALNUT CROP QUALITY LOWER THAN EXPECTED

French walnut production for 1992/93 is estimated at 31,000 tons, unchanged from the October estimate, but 87 percent greater than the 1991/92 frost-reduced crop, according to the U.S. agricultural minister-counselor in Paris. However, the quality of the 1992/93 crop is lower than previously expected. Dry weather throughout the growing season resulted in a high incidence of dark-colored kernels. The food industry generally prefers light-colored kernels.

INDIA: SUGAR PRODUCTION ESTIMATES REVISED DOWNWARD

Indian sugar production for 1992/93 and 1991/92 has been revised downward to 14.0 and 15.2 million tons (raw value), respectively, according to the U.S. agricultural counselor in New Delhi. The poor financial condition of the sugar industry and delayed payments to farmers resulted in a reduction in planted area during 1992/93, especially in the state of Uttar Pradesh. Dry weather at the onset of planting was an additional factor contributing to a reduction in planted area and lower yields in Maharashtra. Currently, several mills in Maharashtra are having difficulty obtaining sugarcane for crushing. Consequently, the 1992/93 production estimate for sugar has been lowered from 14.5 to 14.0 million tons.

The 15.2 million-ton production level achieved during the 1991/92 season was an all-time high. Of this total, 840,000 tons was estimated to be khandsari sugar. An increase in planted area, better yields, and a longer crushing season in all major producing states contributed to the record 1991/92 output.

POLAND: 1992 A MIXED YEAR FOR FRUIT AND VEGETABLE PRODUCTION

The U.S. agricultural counselor in Warsaw reports that total tree fruit production in Poland increased 38 percent in 1992/93, to 1.9 million tons. Apple production increased 37 percent, to 1.6 million tons. Pear production was up 27 percent, to 66,800 tons. The larger output was the result of an increase in bearing tree numbers and favorable spring weather, especially the absence of late-season frosts.

Drought in the spring of 1992 led to a 2-percent reduction in berry production, to 496,700 tons for 1992/93. Hardest hit were strawberries which dropped 22 percent, to 204,500 tons. Raspberry production also declined, dropping 11 percent, to 28,100 tons. Also adversely affected by the drought were vegetables, down 21 percent to 4.5 million tons.

SPAIN: HAZELNUT PRODUCTION ESTIMATE INCREASED, ALMONDS DECREASED

The U.S. agricultural counselor in Madrid is estimating Spain's 1992/93 hazelnut production at 27,100 tons, 59 percent larger than the drought-reduced crop in 1991/92 and 24 percent greater than the preliminary forecast last October. Catalonia, the main hazelnut growing region, experienced drier-than-normal weather which resulted in a late bloom. However, this proved beneficial in that no buds were damaged by the frosts in late-January.

Drought in the eastern part of the country reduced Spain's 1992/93 almond crop to 72,000 tons, 4 percent below the October forecast, but 25 percent greater than the drought-reduced 1991/92 crop. Like hazelnuts, the dry weather led to a late bloom and thus no damage from late-January frosts.

THAILAND: 1992/93 COTTON PRODUCTION UPDATE

According to the U.S. agricultural attache in Bangkok, cotton production for 1992/93 is forecast at 125,000 480-lb bales down 18 percent from last month and down 37 percent from last season's 197,000-bale crop. In response to lower cotton prices in 1991/92, farmers switched a portion of their land to other competitive crops. In addition, reduced use of fertilizers and insecticides resulted in lower yields. Planting was delayed by approximately 1 month mainly due to a lag in the corn harvest. To date, about 90 percent of the total crop has been harvested, with quality generally good since most was harvested under dry conditions.

THAILAND: RICE CROP UPDATE

The U.S. agricultural attache in Bangkok reports that Thailand's rice production for 1992/93 is estimated at 13.1 million tons (milled-basis), down 0.4 million or 3 percent from last year. Harvested area is estimated at 9.7 million hectares, virtually unchanged from a year ago. Main-season crop losses in the lower northeast and the upper north were partially offset by relatively good crops in the lower north and some areas in the upper northeast. Inconsistent rainfall in most of the major rice producing areas during the flowering and grain filling stages as well as problems with fungus and stem borers reduced prospective yields. The portion of the crop harvested before the end of the year had a favorable milling yield. However, a significant part of the crop harvested after January 1 had reduced quality and high moisture content due to unseasonable rainfall. Planting of the second-crop rice has begun and the Thai Government is again trying to encourage farmers to plant less second-crop rice because of low reservoir levels. Although these efforts have not always been successful in the past, the Government continues to promote the planting of alternative cash crops.

FEATURE COMMODITY ARTICLES

INDICATIONS FOR 1993/94 FOREIGN COTTON AREA

Important factors that influence foreign cotton area include the current cotton market situation, domestic and world financial conditions, government policies, and weather. This season's lower world cotton price, which is associated with a relatively high stocks/use ratio, is a significant factor influencing next year's cotton area.

Preliminary indications are that foreign cotton harvested area in 1993/94 could range from 27.0 to 29.0 million hectares, bracketing this year's estimated 28.1 million. The high end of the forecast range implies that government policies in several large producing countries will support increased production in the face of lower cotton prices. The low end of the forecast range considers the effect of this season's lower prices together with the possibility of losses due to weather and financial problems.

China: A large cotton crop would be necessary for the country to maintain its role as a major producer of both raw cotton and textiles. This would allow China to meet its rising domestic consumption requirements and export aspirations. China is expected to continue its push to maintain cotton production in 1993/94. A strong government-supported cotton procurement price, combined with subsidized production inputs, prompted a larger planted area for 1992. This emphasis should diminish for 1993 as the lower world price and large cotton stocks affect China's production policies. For 1993/94, cotton area is expected to fall well below the estimated 6.8 million hectares for 1992. Along with government policy to trim cotton area, farmers have become somewhat disenchanted with cotton. In 1992, the Government paid many cotton farmers with IOU's. Also in 1992, a near uncontrollable cotton boll worm infestation destroyed a large portion of the crop in the North China Plain. Currently, China's cultural practice of intercropping wheat with cotton allows a large population of the boll worms to over-winter; this reduces the effectiveness of pesticides.

FSU-12: Cotton area in the former Soviet Union for 1993/94 is expected to remain near this year's estimated area of 2.9 million hectares. However, two opposing forces could affect the size of the cotton area. Each former Republic wants to maintain or expand area in order to earn hard currency. On the other hand, the Republics want to provide more food production to feed a growing population. The pressure to reduce cotton plantings comes from the Republics' desire to increase the area dedicated to food and forage crop production. Besides their food concerns, the Republics have experienced an increase in land salinity from cotton production. The salinity problem discourages using more land for cotton. On balance, area is expected to stabilize if the civil unrest in Tajikistan and Azerbaijan subsides. The region is employing higher-yielding varieties in an attempt to increase production.

Mexico: Indications are that the area planted to cotton is expected to be up from 1992/93. However, the exact level will depend primarily on government price supports and financing available to producers. Planting for the 1993 season generally occurs between December and April. Currently, very little area has been planted. This situation could change since growers have been lobbying the Government to change the newly implemented support program. Currently, the planned support program targets the states of Baja California Norte and Sonora where 65 percent of the cotton is grown. The new program specifies a producer payment of 800 new pesos, or about US\$254 per hectare. The USDA estimates the cost of production in Sonora at \$1,430 dollars per hectare. Given a cotton selling price of 50 cents per pound and an average yield of 4.5 bales (480-pound bales) per hectare, farmers would gross slightly less than the production cost. This includes the Governmental support of \$254. This situation does not bode well for any substantial increase in area in 1993/94.

Brazil: The largest of the three major cotton producing countries in South America, Brazil's cotton area is expected to be up from the 1992/93 season. This projection is based upon area increases for most of the Center-South Region. The increase in this region is expected to more than offset a slight decrease in area in the Northeast. The Center-South's 1992/93 crop suffered a significant area decrease over the previous crop due to producer dissatisfaction with 1991/92 cotton prices. Because of lower prices, farmers switched area into soybeans. Producer prices are expected to rebound this year and encourage increased cotton plantings. However, planting intentions also will depend on the Brazilian government's rural credit and minimum price policies.

Argentina: Cotton farmers, especially those in the provinces of Chaco and Formosa, have had a series of problems to cope with this year besides being financially weakened from last year's low returns. The current crop was affected by cold weather during the sowing period and heavy rains during the December-January period. The weather in February will be a key factor in production this year and could affect the size of next year's area. Nevertheless, cotton has remained the best choice in recent years in the states of Chaco and Formosa, the main cotton producing areas. This situation indicates only minor changes in area for 1993/94.

Paraguay: Cotton area is on the decline despite the introduction of new, high-yielding varieties which allow for higher plant density per unit of area. This year's area did not reach expected levels because of low government support levels, high production costs, and poor output of the 1991/92 crop. Area in Paraguay will likely continue to decrease in 1993 as two successive years of poor harvests and low international prices have discouraged cotton expansion. Also, the recent boll weevil infestation from Brazil could negatively affect farmers' decisions to plant cotton.

Pakistan: Although cotton plantings will not begin until the April-May period, area intentions for the 1993/94 season are being influenced by this year's lower world cotton prices. However, the Government is expected to implement agricultural policies designed to keep land in production because cotton and the associated textile industry are vital to Pakistan's economy and balance of trade. The 1992/93 cotton crop suffered from one of the most severe floods on record, reducing harvestable area. Further, the inability of producers to complete timely pesticide spraying and a widespread occurrence of leaf curl virus (LCV) reduced yields and lint output. Preliminary expectations are for a improved 1993/94 crop as farmers try to recoup from this year's harvest losses and guard against another pest and virus infected crop. Farmers will likely plant new LCV resistant varieties in 1993/94 and practice new plant management techniques learned from this past year's experience. Area should rebound to near the 2.9 million hectares of 1991/92.

India: Cotton area in 1993/94 is expected to change little from the 1992/93 level. Currently, good soil moisture prevails in the rain-fed areas of the cotton producing regions. Generally, favorable soil moisture at this stage of the year, followed by a normal summer monsoon, result in a larger cotton area. Better quality seed is becoming available, which also should encourage larger plantings. The crop mix in India is expected to change during 1993/94. Cotton area in the north is expected to decline as oilseeds, especially sunflowers, are becoming more price competitive. Cotton area in the south and west is expected to increase since peanuts are no longer as attractive an option due to lower prices and erratic yields. This area increase will likely more than offset the area drop in northern India. On the negative side, cotton prices were down significantly during the current harvest due to a good crop this year, large stock levels, and weak demand for cotton from the mills. If mill consumption or cotton exports pick up in the next several months, cotton will be a much more attractive option at planting time.

Australia: Despite current low cotton prices, the outlook for 1993/94 is for an increase from this season's drought-reduced area. This reflects cotton's relative attractiveness when compared to other competing crops. The mix of dryland and irrigated areas is expected to change. Irrigated cotton area is forecast to increase due to its continued profitability while dryland area is expected to drop in response to falling returns. However, the limited water available for irrigation will be a bigger constraint than the fall in prices.

Turkey: Cotton area is expected to be down slightly from last season since high government support prices have pushed domestic prices above the price of cotton on the world market. This situation has discouraged private-sector dealers and forced government cooperatives to buy most of the cotton. Because of the financial limitations of these cooperatives, payments to farmers have been delayed. These cooperatives still owe some 2,000 billion Turkish Lira to farmers. Despite a 59 percent depreciation of the lira against the dollar in 1992, domestic prices have remained higher than world prices. This situation has made Turkish cotton non-competitive on the world market and has increased the surplus of domestic cotton stocks. These two factors do not indicate higher cotton plantings for 1993/94.

Egypt: Cotton area for 1993/94 is expected to expand as a result of the sizable increase in this year's producer returns from cotton. For the 1993/94 crop, farmers will be free to sell their crop as they choose. Because of this, the Government is considering a producer floor price for cotton. Moreover, the Government has apparently decided to abandon previous requirements on the area planted to cotton. The system of fines and penalties was weakly enforced and often ignored by Egyptian producers.

Greece: Cotton area is expected to increase in 1993/94. However, the availability of water for irrigation will determine farmers' planting intentions for the spring of 1993. Since the supply of water is contingent upon 1992/93 winter precipitation, it remains to be seen if rain and snow cover this winter will result in adequate water supplies for irrigation. While farmers have turned to cotton because of high EC support prices. Available water supplies will be the primary factor that determines area planted.

NOTE: Information in this article is based on field reports received in early January 1993 from U. S. agricultural counselors and attaches, together with information from FAS/USDA Washington analysts. Actual area could vary from these estimates for a number of reasons, including government policy changes, weather during the crop season, and price changes for cotton and competing crops. The first official USDA forecast of total 1993/94 foreign harvested area will be issued in May. Individual country estimates for area, yield, and production will be released in July of this year.

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TABLE 20

Foreign Cotton Area, Yield, and Production

Year	Harvested Area (1,000 Ha)	Yield (Kg/Ha)	Production (1,000 Bales*)
1983/84	27,910	453	58,076
1984/85	29,414	560	75,676
1985/86	27,302	534	66,951
1986/87	25,809	513	60,836
1987/88	26,717	541	66,419
1988/89	25,396	483	56,360
1989/90	27,622	533	67,670
1990/91	28,285	550	71,477
1991/92	29,549	577	78,362
Estimate 1992/93	28,083	526	67,835
5–Year Avg.	27,787	535	68,341
Forecast 1993/94	(27.0 to 29.0)		

*480–pound bales

February 1993

Production Estimates and Crop Assessment Division, FAS, USDA

THE INDIAN SUGAR INDUSTRY 1/

Sugar production is the basis of India's largest agricultural processing industry. The 386 sugar mills, together with an estimated 1,200 open-pan "khandsari" mills that crush 60 percent of the sugarcane crop, produced a record 15.2 million tons of sugar (raw value) during the 1991/92 season, 6.1 million tons more than Brazil, the world's second largest sugar producing country. The balance of India's sugarcane goes to a small-scale, but durable, "gur" (crude brown sugar) industry that meets the sweetener needs of low income consumers.

Sugarcane has been grown in India as far back as the earliest historic records and is mentioned in Hindu religious texts which date back 2,000 years. However, until modern times, the major sugarcane product was a brown-colored sugar mass produced by boiling the juice from something the English called "jaggary," but today is generally identified by its local name "gur." Limited quantities of white sugar from small-scale "khandsari" mills were produced, and even exported, in the 1800's. Around 1900, beet sugar from Europe and cane sugar from Java, produced with technology more sophisticated than that in use in India, began to be imported in large quantities. A few sugar mills were built in Bihar during this time and in Maharashtra in the late teens, but India's sugar industry really did not begin to expand until after the 1931/32 season, when Britain's colonial government imposed a duty on imported sugar. The 32 mills in operation in 1931 grew to 130 in 1935, and 140 in 1950. By 1990, the total number of mills in operation reached the current level of 386.

India's first sugar mills were located mainly along railway lines which made it easy to deliver machinery, as well as transport sugar. Mill sites were selected based on the agronomic requirements of sugarcane cultivation, the chief one being abundant irrigation water. Sugarcane areas established near mills were designated "command" areas and the growers within these areas were obligated to deliver their sugarcane to the local mill for processing. Sugar mills also maintained reserve areas in which they allowed khandsari and gur units to operate. As the mills expanded, so did the plantings of new sugarcane varieties with a higher sucrose content. While this disrupted the traditional sugarcane/rice rotation, possible with the older short-season varieties, the new varieties could be used by the new mills as well as the khandsari and gur units.

Prior to World War II, sugar production was concentrated in the northern states of Bihar and Uttar Pradesh. During the 1950's, production began to expand west and south, especially to Maharashtra. This shift was motivated by the expansion of irrigation systems, the relative profitability of sugarcane compared to other crops in the region, and the provision of fiscal and credit incentives for the establishment of cooperative sugar mills.

1/ Based on a special report by the U.S. agricultural counselor in New Delhi.

The new Government established after India achieved independence from Britain in 1947 placed very tight controls on the sugar industry, requiring that all production be supplied at a set levy price and strictly regulating the rate at which sugar was released to the market. The procurement and pricing of sugar, as well as the release policy, was intended to keep prices remunerative for farmers, yet affordable for consumers. Gluts and shortages were inevitable and, in short supply periods, the black market flourished. At times, growing sugarcane became so unprofitable for farmers and landowners that large areas of sugarcane land were planted to other crops or left idle.

In 1951, the Government introduced a dual marketing mechanism for sugar. Quotas for sales to the government at a regulated price were set for each factory, but one-half of the production in excess of that quota could be sold at free market rates. Faced with a severe sugar shortage during the 1967/68 season, a system of partial decontrol was again re-instituted, permitting 40 percent of a mill's output to be sold on the free market. However, 60 percent still went to the Government at a levy price designed to keep the government's costs low enough to provide sugar at below-market prices to those consumers who had access to the country's ration shops.

Today, sugar production is a major industry in 11 states. The largest producer of milled white sugar is Maharashtra, followed by Uttar Pradesh, Karnataka, and Tamil Nadu. When khandsari is added to the white sugar total, Uttar Pradesh is the largest producing state. Of the total number of mills in operation, about 40 percent are privately-owned. The rest are essentially public sector enterprises. However, a distinction is made between those the Government owns outright and those owned by farmer members, called cooperatives. Farmers are expected to provide only 7 percent of the equity in a cooperative-type mill, with the rest of the funding coming directly from the state government with loans from Federal government-controlled lending institutions. Both cooperative and government-owned mills turn to the government for subsidies when they sustain financial losses, but, when a cooperative mill turns a profit, this profit is shared with the member farmers. Government-owned mills almost never make a profit, having usually been acquired by State governments when their bankruptcy threatened to leave farmers in the command areas without a viable outlet for their sugarcane.

It is possible to open a sugar mill by obtaining a license from the Federal Government. In order to prevent the opening of new mills in established sugarcane areas and bidding the crop away from older mills, the Government regulates the distance between mills. In the past, the minimum distance was 25 kilometers, but recently it has been reduced to 15 kilometers, providing the Government determines that the area can support more than one mill. A sugar mill is obligated to accept and process any sugarcane produced within its reserve area and the crushing season is sometimes extended to allow all the sugarcane within the command and reserve areas to be processed. Cooperative mills are only required to accept sugarcane from member farmers.

Indian economists have questioned the wisdom of further expanding sugarcane production, particularly in the southern and western parts of the country where water is expected to become increasingly scarce in relation to the needs of the cities and other agricultural crops. Farmers continue to view sugarcane favorably because of the relatively low prices for water and the electricity required to run irrigations pumps, as well as the fact that producers have a guaranteed market within hauling distance to a mill. However, the cost/price squeeze on sugar mills has meant that many producers have had to wait months to receive full payment for their sugarcane.

Khandsari and gur units flourished during the 1950's and 1960's because they were exempt from government pricing policies, excise taxes, and release controls. Even though khandsari sugar is considered inferior to refined sugar and sells at a discount compared to free market mill sugar, it usually brings a better price than what the government pays the mill for the levy fraction of its total output.

The khandsari mills established in recent years utilize better crushing machines and processing techniques which have improved the quantity and quality of the product. Currently, there are no official statistics on khandsari production, but state officials report that production is currently 800,000 to 1.0 million tons, most of which is produced in western Uttar Pradesh.

Approximately 50 years ago, gur and khandsari utilized nearly three-fourths of India's total sugarcane crop. Gur accounted for about 65 percent of sugarcane utilization through the 1940's. Gur's share has fallen steadily since independence, but it still utilizes about 30 percent of the sugarcane crop. The large sugar mills now use over 50 percent of India's sugarcane crop. The khandsari mills take about 8 percent and the balance is used for seed, feed, and other purposes. There is no indication that farmers plant different sugarcane varieties for mill or khandsari use. The major criteria for varietal selection are maturity date, expected yield, and the sugar recovery rate.

Sugar mills, by their very existence, create rural income. They elicit the production of a high-value crop on the one hand and create hundreds of jobs in transportation and allied support services. There has been rapid growth during the past 4 years in both the public and private sugar milling sectors, causing considerable financial stress. The situation is particularly acute in northern India, where State governments have ignored the calculations by which the Central Government sets a national minimum purchase price for sugarcane for levy sugar. This requires mills to pay state-advised prices that are as much as 60 percent higher than for other sugar. At the end of the crushing season in July 1992, sugar mills in Uttar Pradesh owed farmers US\$114.0 million for sugarcane delivered but not paid for. Such arrears are not unusual, but this was more than double what the mills owed farmers in July 1991. While the input/output price squeeze is acute in the north, the entire industry is suffering from the accumulation of stocks which had reached a record of more than 5.2 million tons by September 1992. This accumulation of stocks is a

consequence of government release policies. The financing of these stocks, at 121 percent interest, places a large burden on the mills. During the past 4 years, the rate of price increases for sugar has been slightly lower than the general rate of inflation. Government releases of sugar to the ration shop system and the open market have risen by 30 percent since 1988, allowing per capita consumption to rise by more than 5 percent per year, with production up 40 percent over the same period.

The current domestic oversupply problem points to increased exports. Unfortunately, export prices have remained far enough below domestic prices that it has been difficult to keep exports flowing. Losses on exports are offset by profits on small quotas for sugar sales to the United States and the European Community, as well as assessments on all public and private sector mills in proportion to their total output. In 1991/92 about 600,000 tons¹ (raw value) were exported, although expectations were nearer 1.0 million tons. However, the subsidy which would be required for that amount was more than the industry was willing to bear. In the near future, some means must be found of reducing sugar stocks to a more manageable level.

Concerns about the future of the Indian sugar industry relate to the adequacy of water supplies to support continued expansion of sugarcane cultivation, especially in Maharashtra and Tamil Nadu which face severe long-term water problems. In most regions, water and the electric power used to run irrigation pumps are provided to farmers at a nominal cost and in some areas they are free. Sugarcane is among the most profitable crop alternatives, at least within the command and reserve areas of operating sugar mills. It financially out performs the rice/wheat rotation. However, a number of Indian economists have been raising questions about the wisdom of encouraging further growth in the sugar sector when the commodity is in surplus, when exports are possible only with subsidies, and when the country appears to be slipping into a deficit food grain production position.

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CHART 1

Indian Sugarcane

Area Harvested - 1991/92

(Percent of Total)

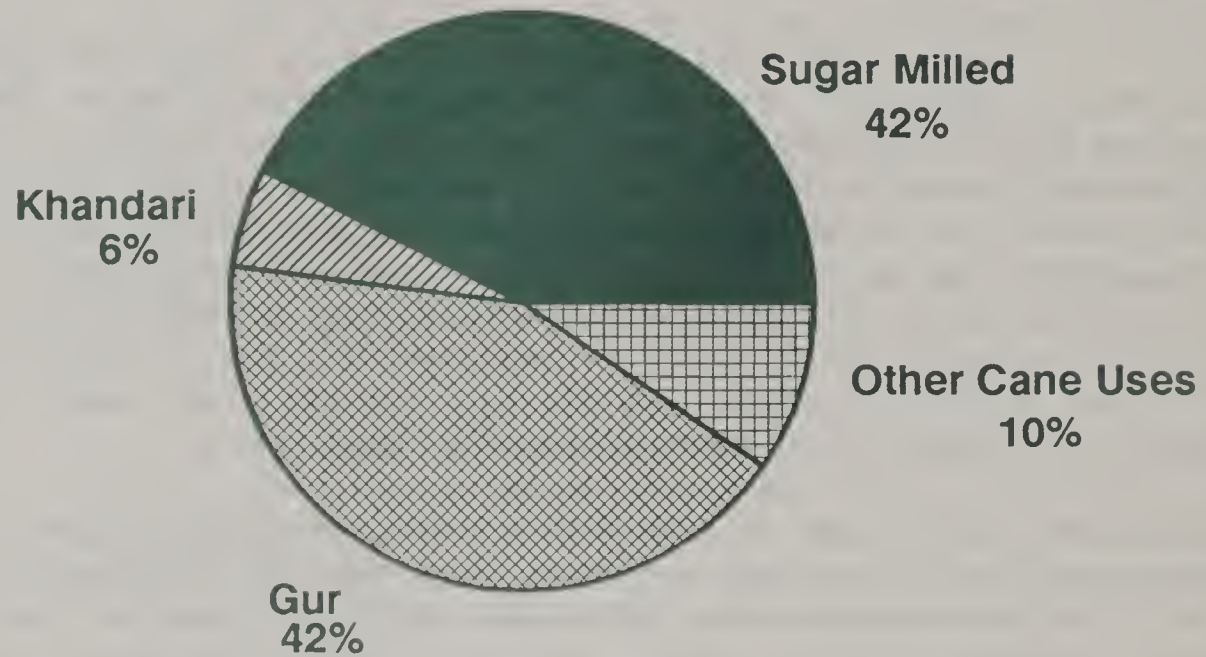


CHART 2

Production - 1991/92

(Percent of Total)

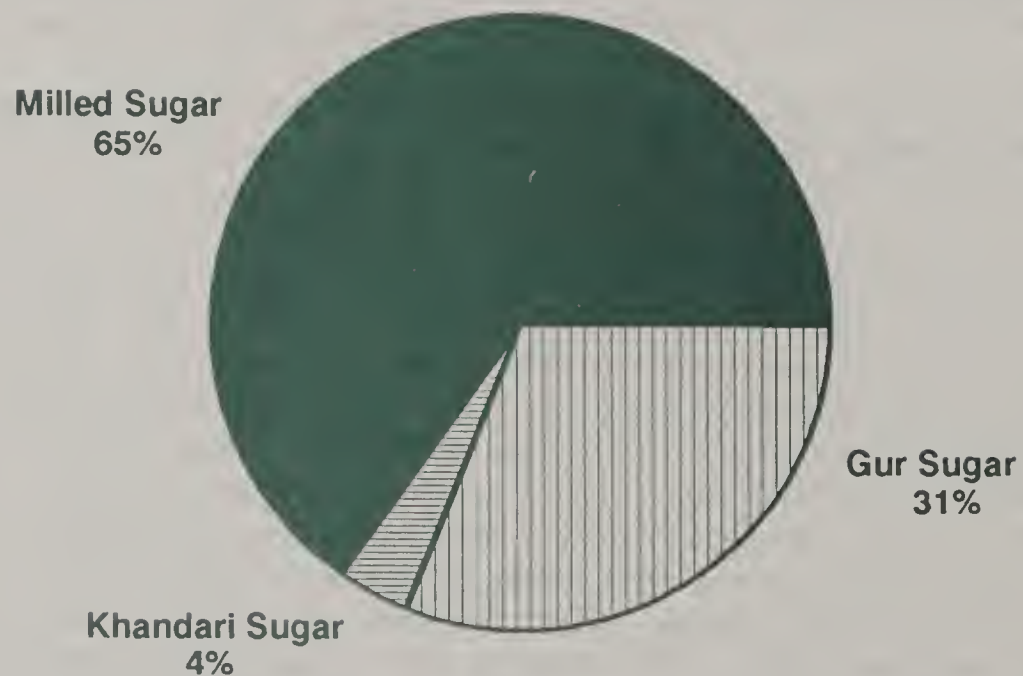


TABLE 21

INDIA: SUGARCANE AREA, YIELD, AND PRODUCTION AND SUGAR PRODUCTION

COUNTRY/YEAR	AREA HARVESTED	YIELD	RAW MATERIAL PRODUCTION	SUGAR PRODUCTION	RECOVERY RATE	SUGAR YIELD
	1,000 Ha	MT/Ha	1,000 MT	1,000 MT	Percent	MT/Ha
Milled Sugar 1/						
1985/86	1,150	60.0	68,977	7,507	10.9	6.53
1986/87	1,411	60.4	85,229	9,097	10.7	6.45
1987/88	1,566	60.0	93,943	9,748	10.4	6.22
1988/89	1,405	61.0	85,692	9,365	10.9	6.67
1989/90	1,700	65.4	111,148	11,757	10.6	6.92
1990/91	1,875	65.2	122,319	12,889	10.5	6.87
1991/92	2,040	65.3	133,180	14,340	10.8	7.03
1992/93	1,997	59.5	118,900	13,200	11.1	6.61
Khandsari Sugar 2/						
1985/86	172	60.1	10,330	642	6.2	3.73
1986/87	281	60.5	17,000	1,056	6.2	3.76
1987/88	247	60.0	14,810	844	5.7	3.42
1988/89	215	61.1	13,133	812	6.2	3.78
1989/90	202	65.3	13,200	818	6.2	4.05
1990/91	212	65.1	13,800	859	6.2	4.05
1991/92	266	65.8	17,500	840	4.8	3.16
1992/93	206	64.7	13,320	800	6.0	3.88
Total Centrifugal Sugar						
1985/86	1,322	60.0	79,307	8,149	10.3	6.16
1986/87	1,692	60.4	102,229	10,153	9.9	6.00
1987/88	1,813	60.0	108,753	10,591	9.7	5.84
1988/89	1,620	61.0	98,825	10,177	10.3	6.28
1989/90	1,902	65.4	124,348	12,575	10.1	6.61
1990/91	2,087	65.2	136,119	13,748	10.1	6.59
1991/92	2,306	65.3	150,680	15,180	10.1	6.58
1992/93	2,203	60.0	132,220	14,000	10.6	6.35
Gur (crude brown sugar)						
1985/86	1,196	60.0	71,770			
1986/87	1,019	60.4	61,530			
1987/88	1,071	50.0	64,250			
1988/89	1,309	61.0	79,850			
1989/90	1,133	65.4	74,070			
1990/91	1,156	65.2	75,340			
1991/92	1,040	65.8	68,420			
1992/93	1,091	64.6	70,480			
Other Cane						
1985/86	343	60.1	20,600			
1986/87	370	60.4	22,330			
1987/88	396	59.9	23,740			
1988/89	399	61.1	24,360			
1989/90	414	65.3	27,050			
1990/91	442	65.2	28,830			
1991/92	459	65.8	30,200			
1992/93	449	64.6	29,000			
Total Sugarcane						
1985/86	2,861	60.0	171,677			
1986/87	3,081	60.4	186,089			
1987/88	3,280	60.0	196,743			
1988/89	3,328	61.0	203,035			
1989/90	3,449	65.4	225,468			
1990/91	3,685	65.2	240,289			
1991/92	3,805	65.5	249,300			
1992/93	3,743	61.9	231,700			

1/ Milled sugar converted to raw value by a factor of 1.07. 2/ Khandsari sugar converted to raw value by a factor of 1.035.

WORLD RICE PRODUCTION

World rice production for 1992/93 is estimated at 351.9 million tons (milled basis), up 3.5 million or 1 percent from last year. Increased production for the United States, Indonesia, Japan, and China more than offset decreases in Thailand, Pakistan, Vietnam, and India. World harvested area is estimated at 146.6 million hectares, up 1.0 million or 1 percent from last year due primarily to an increase in Indonesia. Global average yield is virtually unchanged from last year. (See Table 10 of this circular for area, yield, and production for individual countries and regions.) In many countries, given adequate irrigation supplies, rice is grown year round.

United States: Rice production is estimated at 5.7 million tons, up 0.7 million or 13 percent from last year. This is the second highest production since the 6.0 million tons produced in 1981/82. Favorable spring weather allowed rice planting to be completed early and enabled crop maturity to advance. Rains delayed harvest progress in August, but favorable weather in September accelerated harvest activity. The harvest was complete by the end of October.

Thailand: Rice production is estimated at 13.1 million tons, down 0.4 million or 3 percent from last year. The main-season crop is virtually harvested and represents over 90 percent of total production. The U.S. agricultural attache in Bangkok reported that fungal problems, stem borers, and inconsistent rainfall throughout much of the major rice-growing regions caused area and yield to be lower than anticipated. The second season crop, which is nearly 70 percent irrigated, is currently being planted. The Thai Government is urging farmers, again this year, to switch to alternative cash crops from second-season rice due to low reservoir levels. However, over the last few years farmers generally have continued to plant rice.

Indonesia: Rice production is estimated at a record 30.8 million tons, up 1.8 million or 6 percent from last year. Harvested area is estimated to climb to a record 10.9 million hectares, up 6 percent from last year. Throughout Java, the main rice producing island, irrigation reservoirs are fully recharged due to unusually heavy rains during the third quarter of 1992. Favorable weather encouraged farmers to plant additional rice, especially on non-irrigated land. Rice area also is expanding in Sumatra.

Vietnam: Rice production is estimated at 13.9 million tons, down 0.6 million or 4 percent from 1991/92. Harvested area is estimated at a record 6.3 million hectares. The first of Vietnam's 3 rice crops has matured and harvest activity is nearing completion. Weather was generally favorable throughout the growing season and no significant evidence of insect damage was reported. The main-season or 10th-month crop is estimated at 5.0 million tons. The winter-spring crop, which is normally about the size of the 10th-month crop, will begin to be harvested in March in the South and June in the North. The summer-autumn crop is estimated to remain stable at about 20 percent of total production.

Burma: Rice production for 1992/93 is estimated at 7.8 million tons, up 0.4 million or 5 percent from last year. After returning from a recent trip into Burma, the U.S. agricultural attache in Bangkok indicated that the milling rate for the past 3 years declined from 60 percent to 58 percent. Harvested area is estimated to increase from last year because above-normal rainfall in some major rice-growing areas enabled farmers to double crop rice during the monsoon period. The attache also reported that at least 0.1 million hectares of second-crop (dry season) rice is now being produced for the first time. The Government is planning an ambitious program to expand that area to 2.0 million hectares within the next 4 years. The second crop will be irrigated from reservoirs, nearby rivers and creeks, and tube wells.

China: Rice production is estimated at 129.5 million tons, up 0.8 million or nearly 1 percent from last year, but below the record 132.5 million produced in 1990/91. Harvested area is estimated at 32.5 million hectares, marginally lower than last year due to a historic shift toward market-oriented production and distribution policies. Central authorities have loosened their grip on production and distribution in favor of "high-quality, high-production, and high-efficiency" agriculture. Estimated yields improved over last year's flood-damaged crop, but were not as high as those of the record 1990 crop. Rice is planted from February through July, depending on location. Harvest usually occurs from June through December.

India: Rice production is estimated at 73.0 million tons, down 0.7 million or 1 percent from last year. Area is estimated 42.0 million hectares, slightly lower than last year. In Punjab and Haryana, the harvest is complete and production is estimated to be equal to or marginally better than last year. Planted area declined in these 2 states, but yields improved due to the favorable monsoon. In addition, area is expected to be lower in Andhra Pradesh where the "kharif" crop (fall-planted and early winter-harvested rice) declined due to the erratic performance of the monsoon and ongoing repair work on irrigation canals. The average yield for India is virtually unchanged from last year.

Bangladesh: Rice production is estimated at a record 18.8 million tons, up 0.4 million or 2 percent from last year. Harvested area is estimated at 10.3 million hectares, slightly higher than last year. The 3 major crops, Aus (harvested during August), Aman (harvested in December), and Boro (harvested in May/June) are estimated to be higher than last year. The Aus crop has been declining in recent years as farmers switched to the higher-yielding, irrigated Boro crop. The Boro crop represents over 35 percent of total production while the Aman crop usually represents about one-half of the national output. Initial reports indicate that production of the Aman crop is expected to reach a record level. Although dry conditions prevailed through the latter part of the monsoon season, it appears that the Aman crop was not significantly affected. The Boro crop was planted under favorable conditions. The USDA crop year ends with the Boro harvest.

Pakistan: Rice production is estimated at 2.8 million tons, down 0.4 million or 14 percent from 1991/92. Harvested area declined from last year because extensive rains in August caused flooding in the major rice producing districts of Sindh Province. Nearly one-half of the national crop is produced in this province and is primarily made up of IRRI varieties. Most of the remainder of the crop is produced in Punjab Province, the basmati growing center. The basmati crop was not as severely affected by the floods as was the IRRI crop. Harvest activity is usually completed by December.

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FORMER SOVIET UNION 1992/93 HARVEST RESULTS

The U.S. agricultural minister-counselor in Moscow reports that the Statistical Committee of the Commonwealth of Independent States (CIS) has published 1992 harvest data for selected crops, including total grain and sunflowerseed. While the figures do not specify production by grain type, e.g. wheat, State-level totals were provided for all member nations of the CIS. The CIS includes all newly independent States of the former Soviet Union except the Baltics (Lithuania, Latvia, Estonia) and Georgia. Grain-production numbers published by the CIS are expressed on a net-weight basis and include pulses and minor grains. USDA production estimates for the FSU-12 and the Baltics do not include pulses and minor grains.

The FSU-12 grain harvest for 1992/93 is estimated at 181.9 million tons (net weight, not including pulses and minor grains), up 24 percent from last year's total of 146.7 million. The 1992/93 grain harvest benefited from an excellent spring grain crop: in Kazakhstan alone, total grain production rose about 18 million tons over last year, and production also increased in Russia and Belarus despite a prolonged drought in northern Europe. The Baltic grain crop, however, did not escape unharmed and is estimated at only 3.1 million tons (not including pulses and minor grains), down from 5.5 million in 1991/92.

Sunflowerseed production in the FSU-12 suffered from a combination of weather-related stress and reported shortages of fuel and machinery. While the 1992/93 harvest of 5.5 million tons was only down slightly from the previous year, both years experienced below-average yields. Sunflowerseed production was down particularly in Ukraine, falling 13 percent.

A prolonged drought during 1992 which extended over northern Europe from May through July raised official concerns over the potential for serious reductions in crop yields in Belarus, the Baltics states, and northwestern Russia. A July edition of a Minsk newspaper predicted that, based on preliminary harvest results, the total Belarus grain harvest would be 1.5 to 2.0 million tons below the 1991/92 harvest of 6.3 million. (For the purpose of convenient comparison with official projections, and unless otherwise indicated, State-level grain production figures will be cited within the text as they are reported in CIS publications: including pulses and minor grains.) A Lithuanian newspaper reported in August that even by the most optimistic estimates the 1992/93 grain yield would reach only about 1.4 tons per hectare, one-half the previous year's level. A November press report estimated Lithuanian grain production at approximately 1.9 million tons (compared to 3.5 million last year), substantiating earlier predictions of a poor Baltic grain crop. Initial fears of a drastically reduced grain yield in Belarus, however, proved to be groundless since the final harvests turned out to be much better than early press reports indicated. Grain production in Belarus reached 7.2 million tons, 15 percent above the previous year.

Official projections of Russian grain production fluctuated during the summer, before beginning their steady upward climb as the harvest progressed. Some early-season forecasts were as low as 93 million tons due to drought-induced apprehension over yield and fears about inadequate supplies of fuel and equipment. Better-than-expected preliminary harvest results nudged estimates steadily upward and the final harvest of 106.8 million tons surpassed the 1991/92 total by 17.0 million. Total grain yield was remarkably high at approximately 1.7 tons per hectare; only in 1990/91 was total grain yield higher when 1.84 tons per hectare were harvested.

For the second year in a row, the Ukrainian grain harvest is considerably below the 1986-90 average of 47.0 million tons. Total 1992/93 grain production is estimated at 38.5 million tons, almost matching the previous year's output and falling within the range of August projections of a 38 to 40 million-ton crop. Higher-than-average winterkill in western Ukraine and dry July weather in parts of central and southern Ukraine contributed to reduced yields. Interviews by FAS/USDA personnel with oblast-level agricultural officials during the past 2 seasons, however, have pointed toward another factor contributing to 2 consecutive years of lower-than-average yields: the diminishing availability of plant-protection agents which have traditionally been imported from U.S. and European suppliers in exchange for hard currency. As hard-currency reserves have become depleted, agrochemical imports have fallen. As a result, the expansion of crop area under the Intensive Technology Program, which has been occurring since 1986, is now facing dwindling supplies of critical herbicides and fungicides - chemicals upon which the continued successful application of Intensive Technology depends.

Moldova suffered a crippling July drought which, according to official reports, halved its corn-for-grain production. Although winter grains likely escaped relatively unharmed, total grain production for 1992/93 in Moldova dropped to 2.1 million tons, from 3.0 million the previous year, resulting in the lowest total-grain yield in 20 years.

In stark contrast to Moldova's sharply reduced crop, the 1992/93 Kazakhstan grain harvest was outstanding. Adequate and timely precipitation throughout the growing season and minimal temperature stress drove total grain yield to a record level of approximately 1.3 tons per hectare. Production reached an estimated 29.5 million tons, a 150 percent increase over the previous year's drought-reduced crop. In addition to the favorable weather, high residual soil fertility (following the low 1991/92 yield) and the more efficient application of plant-protection chemicals contributed to the bumper harvest.

Grain production in Central Asia has been the focus of increased attention by agricultural officials over the last several years. A desire to achieve agricultural self-sufficiency, coupled with concerns over the detrimental effects of intensive cotton production, has resulted in a 40-percent increase in total grain area in Central Asia (Uzbekistan, Turkmenistan, Tajikistan, and Kyrgyzstan) since 1986. Total grain production in the Central Asian States is estimated at 4.8 million tons in 1992/93. The most sudden and dramatic jump in production has occurred in Turkmenistan where output has risen from less than 0.3 million tons 10 years ago to 0.8 million in 1992/93. The official goal is to be totally self-sufficient in grain production in 1993/94. Kyrgyzstan (with output of 1.5 million tons in 1992/93) and Uzbekistan (2.2 million) are the major grain producers in Central Asia. Despite severe civil unrest which has had a significant impact on cotton production,

Tajikistan managed to produce an near-average grain crop of 0.3 million tons. Although the Central Asian States together produce only 2 percent of FSU-12 total grain, the region is responsible for over 8 percent of corn and 25 percent of rice output.

Ethnic clashes in the Trans-Caucasus region apparently did not have a significant affect on the 1992/93 grain harvest. Production in Azerbaijan was 1.3 million tons, about the same as the previous year. Armenia, which occupies last place in grain production among the 15 newly independent States of the former Soviet Union, also matched its 1991/92 crop with 0.3 million tons.

Final production for Georgia, the only FSU-12 state not belonging to the CIS, is not included in the published data. The potential effect of Georgia's continuing ethnic and political strife on agricultural output is difficult to estimate but a grain harvest of 0.6 million tons (the average of the past 6 years) seems unlikely.

Although total FSU-12 sunflowerseed production for 1992/93 dropped for the third year in a row to 5.5 million tons, the FSU-12 remains the largest producer of sunflowerseed in the world. The pace of the 1992/93 Russian sunflowerseed harvest lagged behind that of last year. By the end of October only 55 percent of sunflower area had been harvested compared to almost 90 percent at the same time the previous year. Final 1992/93 Russian production reached 3.1 million tons, surpassing last year's level by 0.2 million. The estimated yield was 1.19 tons per hectare, a modest 6 percent improvement over the stress-reduced 1991 yield, but below the 1986-90 average of 1.27 tons.

Ukrainian production of sunflowerseed slid to 2.1 million tons in 1992/93, continuing its steady decline from the 1989/90 mark of 2.9 million tons and considerably below the 5-year (1986-1990) average of 2.7 million. Kazakhstan sunflower area was relatively unchanged from last year: preliminary 1992 area was reported at 186,000 hectares, compared to 193,000 in 1991. Although Kazakh production of 123,000 metric tons represented a 12 percent increase over last year, yield was 30 percent below the 5-year average. In Moldova, sunflowerseed yield was affected by dry weather for the second consecutive year. Production totaled 0.2 million tons, a 15 percent increase over 1991/92 production, but below the 1986-90 average.

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TABLE 22

FSU-12: Estimated Total Grain and Sunflowerseed Production
(Million Metric Tons)

	Grain Production 1/		Sunflowerseed Production 2/	
	1990/91	1991/92	1990/91	1991/92
Russia	110.6	84.6	3.4	2.9
Ukraine	47.3	36.3	2.7	2.4
Belarus	6.7	6.0	0.0	0.0
Moldova	2.4	2.8	0.2	0.2
Kazakhstan	27.9	11.4	0.1	0.1
Azerbaijan	1.3	1.2	0.0	0.0
Armenia	0.2	0.3	0.0	0.0
Uzbekistan	1.7	1.6	0.0	0.0
Kyrgyzstan	1.5	1.3	0.0	0.0
Tajikistan	0.3	0.3	0.0	0.0
Turkmenistan	0.4	0.4	0.0	0.0
Total CIS	200.3	146.2	6.4	5.6
Georgia 3/	0.7	0.5	0.0	0.0
Total FSU-12 4/	201.1	146.7	6.6	5.6
Baltics 3/	5.5	5.5	0.0	0.0

1/ Estimate of grain production excluding pulses and minor grains.

2/ Zero values indicate either no production or negligible production. Column totals subject to rounding error.

3/ Official total grain production not yet published. FAS internal estimates – not official USDA estimates.

4/ May not add due to rounding.

BRAZIL SOYBEAN TRIP REPORT

USDA Washington-based analysts and U.S. agricultural attaches stationed in Brasilia and Sao Paulo recently traveled throughout the Brazilian soybean-producing areas to assess the current agricultural situation. Field analyses and meetings with industry groups were conducted in Rio Grande do Sul, Parana, Sao Paulo, Goias, and Mato Grosso. Based on the information obtained, the Brazilian soybean production estimate for 1992/93 was revised upward 0.8 million tons, to 20.8 million.

Growing conditions throughout Brazil, with the exception of an area extending from northern Parana to southern Sao Paulo State, have been generally favorable this season. This and increased input utilization is expected to boost Brazil's average soybean yield to 1.91 tons per hectare, equal to the record established in 1988/89.

The increased availability of government credit, as well as higher soybean prices, made inputs more affordable after several seasons of relatively low utilization. Even with more credit available this year, a significant number of farmers chose to swap future harvested soybeans for seed, fertilizer, and other inputs through their cooperative organizations. This practice avoids the uncertainty of repaying credit at a fixed interest rate which is adjusted for an inflation rate as high as 20 percent per month. The use of forward sales for financing has grown to an estimated 3.6 to 3.8 million tons of new-crop soybeans. The majority of these soybeans were sold at or near their cost of production.

Brazilian soybean area is projected to reach 10.9 million hectares, up 0.1 million from last month's estimate and up 6 percent from 1991/92. Area is up due to the switching of land out of corn, cotton, or pasture. Relative soybean prices are considered the main reason for this shift. Soybeans are viewed as more profitable due to the relatively strong international demand for soybean products.

In Rio Grande do Sul, conditions generally have been favorable with soybean yields expected to be near those reached last year. The soybean crop experienced some isolated dryness but not the dry, hot conditions that occurred in northern Parana during much of November and early December 1992.

Soybean areas in the states of Parana and southern Sao Paulo received little rainfall and experienced high summer temperatures from approximately November 15 through mid-December. The most affected soybeans were the early-planted, early-maturing varieties, some of which were in the flowering and pod setting stages. Only about 15 percent of the total soybean crop is the early-planted variety which is harvested beginning in February. While it was reported that a number of producers suffered losses in yield potential during this period, the most damaging combination of dryness and high temperatures was isolated to random areas throughout the 2 states. Rainfall since mid-December returned to near ideal levels, improving yield prospects for the remaining early-planted varieties as well as the later maturing varieties. As a result, average yields are expected to be down only marginally from last season.

The States of Goias, Mato Grosso do Sul, and Mato Grosso also suffered from a short period of dryness, which lasted no more than 15 days, during the November/December period. Early-maturing varieties in these states, some of which were in the critical development stages, only suffered minor stress. Most soybeans in these areas recovered with the onset of additional rains. In both Goias and southern Mato Grosso (south of Cuiaba), soybean yields have gradually improved with the build-up of soil nutrients. In the newest soybean area of northern Mato Grosso, yields likely will improve over time as lime and fertilizer are applied. Overall, average yields for Goias, Mato Grosso do Sul, and Mato Grosso are expected to be near those reached last season.

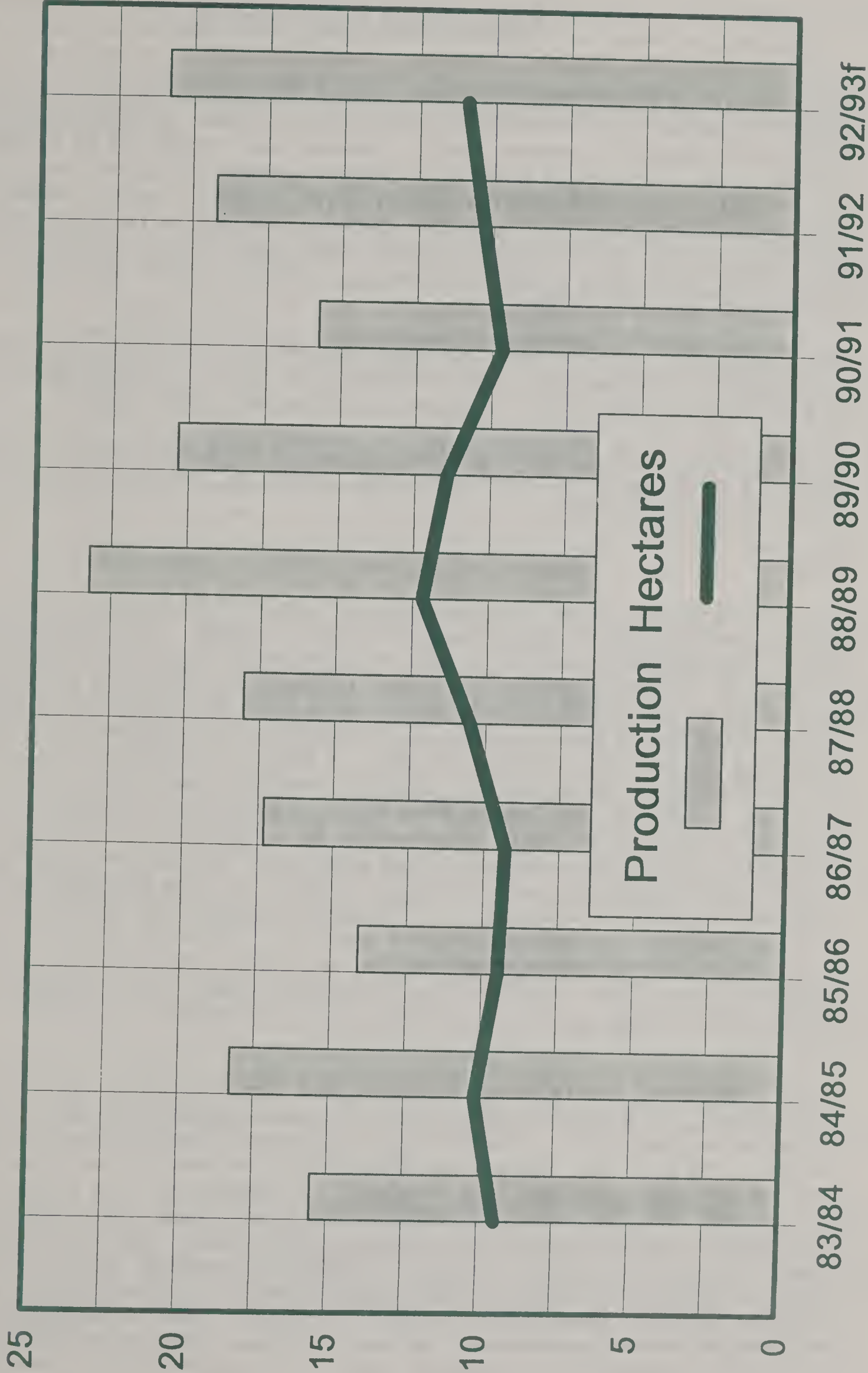
Brazilian Soybean
Harvested Area, Yield, and Production
(1,000 hectares, tons/hectare, and 1,000 tons)

Year	Area	Yield	Production
1983/84	9,421	1.65	15,541
1984/85	10,153	1.80	18,278
1985/86	9,450	1.49	14,100
1986/87	9,270	1.87	17,300
1987/88	10,524	1.71	18,021
1988/89	12,170	1.91	23,200
1989/90	11,400	1.78	20,340
1990/91	9,650	1.63	15,750
1991/92	10,300	1.85	19,100
1992/93	10,800	1.91	20,800

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Brazilian Soybean Area and Production

Million tons and hectares



SOUTH AFRICAN CORN SITUATION

The Republic of South Africa is the largest producer of corn in Africa and is normally a major corn exporter, particularly to other African countries. In the 1991/92 season, a severe drought reduced corn output by 60 percent, to 3.1 million tons, forcing the country to import around 5 million tons in the local 1991/92 (May 1992-April 1993) marketing year to meet domestic demand. Since the drought continued well into the southern hemisphere fall and winter, it also reduced the 1992/93 South African wheat crop to 1.3 million tons, almost 1.0 million lower than normal and led to livestock losses and major reductions in oilseeds and cash crops.

Corn yields for 1992/93 were threatened by unfavorably warm, dry weather in late December and January. The February USDA 1992/93 corn production estimate is 8.0 million tons, up 4.9 million or 156 percent from 1991/92.

In early January 1993, South African officials were predicting a 1992/93 corn crop of 8.0 to nearly 11.0 million tons, based on increased planted area and a return to average yields.

Weather

Soil moisture was low at the beginning of the 1992/93 planting season (October through December 1992) following last year's drought. The spring rains of October and November started slowly but most of the primary corn-producing region (the 'Maize Triangle') received adequate moisture for planting. Drier weather in mid-November allowed planting to progress rapidly and the South Africa Maize Board reported that as of December 31, farmers had planted an estimated 3.5 million hectares of corn, a small increase over last year. December rainfall was close to normal in eastern crop areas of the Maize Triangle. Although the Orange Free State, southwestern Transvaal, and Cape Province had unusually warm, dry weather in December, most agricultural officials were still optimistic about the crop. Widespread scattered showers across the northern and eastern Maize Triangle in late December and heavy, seasonal rainfall in neighboring Zimbabwe and Zambia led officials to believe that the devastating drought of 1992 was over. In early January, an official of the South Africa Maize Board said a corn crop of 9.0 million tons was possible given higher planted area and normal weather for the rest of the season, while other sources estimated the crop between 8.0 and 11.0 million tons.

South African officials began to worry that the drought of 1992 had not been broken when, in a pattern similar to last year, January rainfall in the Maize Triangle tapered off to intermittent showers and temperatures rose above normal. The hot, dry weather was particularly stressful for young plants and part of the crop that was just reaching the tasseling stage of development. By mid-January, agricultural officials in the Orange Free State reported serious crop damage and that production prospects were worse than last year in some areas. There were similar reports of severely stressed corn, including some complete losses, in Transvaal and Cape Province. At that time, a statement from the National Association of Maize Producers (NAMPO) indicated that unless the drought ended immediately, the South African crop could be no greater than the 1991/92 harvest of 3.0 million tons. In late January, a combination of

widespread and locally-heavy showers, milder temperatures, and higher humidity helped ease the dryness and improve crop prospects in most of the Maize Triangle and parts of northern Natal. The final output of the 1992/93 corn crop will be decided, in large part, by the amount and distribution of February rainfall. The first official production estimate from the Maize Board will be released on March 15.

Background

Corn is the most important grain crop produced in South Africa, accounting for about 80 percent of the country's total grain output and 45 percent of total cultivated area. Production is concentrated in the Maize Triangle, a region centered on southern Transvaal and northern Orange Free State. About 58 percent of South Africa's total corn crop is produced in Transvaal and 32 percent in Orange Free State, while Cape Province and Natal each produce about 5 percent of the crop. Over 90 percent of the corn is grown on commercial farms using modern, highly-mechanized methods. The remainder is produced for personal use by subsistence farmers on small plots of land. South Africa is one of the world's largest producers of white corn, which is used largely for human consumption and makes up an essential part of the South African diet. White corn is mostly grown in the eastern part of the Maize Triangle and comprises roughly one-half of the country's total crop. Yellow corn, used mainly for animal feed, is grown primarily in western areas.

In South Africa, corn is planted after the start of spring rains in October and harvested during the winter months of May to August. Although South Africa's Maize Triangle receives less rainfall than the U.S. corn belt, it has the advantages of a longer growing season which allows planting to take place over a longer period, and dryer weather during the harvesting season which permits the corn to dry naturally and helps produce a high-quality crop. However, South Africa's climate is highly variable; drought, early frost, and other unfavorable weather often have a major effect on output. Since 1970, production has usually ranged between 7.0 and 10.0 million tons, but output has been as high as 14.7 million (1980/81) and as low as 3.1 million (1991/92). The main factor affecting corn yield has been the weather during the critical silking/tasseling stages in January and February when drought and high temperatures pose the greatest threat.

The area sown to corn has declined steadily since 1981/82, dropping from 4.3 million hectares to a low of 3.03 million in 1990/91. Although planted area increased the last 2 years, the downward trend is expected to continue due in part to the declining profitability of corn production. Producer income in recent years has been severely restricted by a reduction of government subsidies, low producer prices, high inflation, high interest rates, and weather-related crop losses. These factors forced corn producers to cut back on planted area or switch to other crops.

Another reason for the decline in area has been the establishment of the Land Conversion Scheme. This program, in recent years, has shifted 500,000 hectares of marginal farmland out of corn production and into pasture. South African officials say that corn area could drop below 3.0 million hectares in the near future unless corn production becomes more profitable and adequate credit is made available.

Policy and Outlook

The goal of South Africa's corn production policies is to produce a stable supply of corn to meet its domestic demand of 6.5 to 7.0 million tons and to have a small exportable surplus for its traditional customers. A wide range of government assistance is made available to farmers in the form of price subsidies, loan guarantees, debt write-offs, and humanitarian aid to support farmers and their workers. Following last year's drought, the South African Government developed a large-scale financial assistance package valued at R3.86 billion (1 Rand = \$US0.33) which helped farmers stay solvent and purchase the seeds and inputs needed to plant a new crop in 1992/93.

South African corn is marketed through a one-channel system controlled by the Maize Board which is made up of representatives from various groups that have an interest in the corn industry. The Board is the sole buyer and distributor of corn products from the country's most important producing region; handling more than 90 percent of the crop. The Maize Board sets the purchasing and selling prices at a level considered equitable to both farmers and consumers, implements a grading system and quality standards for corn and corn products, holds and distributes corn stocks, and promotes corn use by developing and marketing new consumer products. The Maize Board also acts as an import agent for the South African Government and makes corn available to the members of the South African Customs Union (Namibia, Swaziland, Lesotho, Botswana) and the Homelands.

Since 1986/87, the Government has followed a more market-related policy which has encouraged increasing domestic consumption of corn, especially in the livestock sector. Although feed use was flat in 1992/93 because of a drop in the national cattle herd due to the drought, the demand for feed corn is expected to rise in the next few years in response to the growing market for animal products. Consumption of white corn has leveled off due to an economic recession, civil disruption, unemployment, and consumer resistance to the mixing of yellow with white corn (the result of drought-related white corn shortages). However, demand is expected to grow slowly in the future as the economy improves and the population increases. Corn grown in the Republic of South Africa enjoys a comparative advantage in the African market due to market proximity and a reliable supply of large quantities of high-quality white corn. South Africa soon may lose its status as a major corn exporter, given the predicted trends in domestic supply and consumption. South Africa likely will experience more corn shortages in the future and could become a net importer of corn and wheat even in normal production years.

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TABLE 23

South Africa: Corn Production

Year	Area (MHa)	Yield (MT/Ha)	Production (MMT)
73/74	4.46	2.49	11.11
74/75	4.49	2.04	9.14
75/76	4.55	1.61	7.31
76/77	4.45	2.19	9.73
77/78	4.50	2.24	10.06
78/79	4.31	1.93	8.33
79/80	4.32	2.49	10.76
80/81	4.34	3.38	14.66
81/82	4.28	1.95	8.36
82/83	4.07	1.00	4.08
83/84	3.95	1.12	4.41
84/85	3.91	2.08	8.14
85/86	4.05	2.00	8.08
86/87	4.03	1.77	7.15
87/88	3.66	1.93	7.08
88/89	3.78	3.28	12.38
89/90	3.48	2.56	8.90
90/91	3.03	2.74	8.30
91/92	3.45	0.91	3.13
92/93	3.50	2.29	8.00

February 1993

Production Estimates and Crop Assessment Division, FAS, USDA

INDIAN WHEAT AND RAPESEED PRODUCTION

The winter growing season in India (October-May) is dominated by two crops, wheat and rapeseed. They both are vital to the overall agricultural economy, being the second most important grain and oilseed. They compete for available land and input resources on a minor scale, based on yearly variations in crop prices. Over the long term, no significant area displacement has occurred from this competition primarily because of their individual importance in the grain and oilseed sectors. The total area devoted to these crops has remained relatively stable over the past 15 to 20 years, ranging between 25 and 30 million hectares.

Wheat production for 1992/93 (harvested in April 1992) is estimated at a near-record 55.0 million tons, resulting from timely showers in the rainfed growing regions. Irrigated wheat yields also were reported to have improved in the key growing states of Punjab, Haryana, and Rajasthan. The 1993/94 crop was sown under exceptionally good moisture conditions during October and November of 1992. The USDA will make its initial estimate of this crop in May.

The 1992/93 rapeseed crop also was planted under ideal conditions this past fall. The major portion of the harvest is in February and promises to be substantial. Output for 1992/93 is estimated at a record 6.5 million tons. Field reports of a bumper harvest already have softened domestic vegetable oil prices. Rapeseed area and yield are forecast at a record 6.6 million hectares and 0.98 tons per hectare, respectively.

During the last 2 years, rapeseed cultivation has increased dramatically -- rising 1.6 million hectares or 32 percent since 1990/91. This recent expansion occurred at the expense of wheat, coarse grains, sugarcane, and pulses. It happened not only during the traditional winter-growing period, but also during the off-season when rapeseed began to be cultivated as an interim crop following the summer monsoon. Rapeseed's value as a short-season "catch-crop" was demonstrated during the summer drought of 1989/90 when farmers were encouraged to cultivate new varieties in place of failed rice and coarse grain crops. Their success has encouraged farmers to consider its use in non-traditional seasons and growing regions.

The rapid growth of rapeseed since 1990/91 was fueled by favorable government support prices. In an effort to revitalize domestic production of rapeseed and enhance grower returns, significant annual increases in rapeseed procurement prices were coupled with a policy of restricted edible oil imports. The activation of these incentive programs coincided with generally favorable growing conditions, resulting in an abundance of rapeseed and a current national surplus of edible oils. Government price policy in the near future, however, is likely to swing back in favor of grains. The Government announced in early January that wheat procurement prices would be increased by 25 percent for the current 1993/94 crop. This will begin to reduce the significant gap between rapeseed and wheat prices. Prior to this announcement, the U.S. agricultural counselor in New Delhi estimated that the farm price ratio of wheat and rapeseed was 2.8:1, favoring rapeseed.

Winter Conditions

The winter growing season in India is called "Rabi." Rabi crops are typically sown from October to December and harvested prior to May. The rabi agricultural period is predominantly dry, though storm systems periodically sweep through the northern states. Rainfall averages between 25-75 millimeters and rabi crops depend heavily upon stored soil moisture and irrigation. Wheat is by far the largest rabi crop, encompassing greater than 23.0 million hectares. Nearly 80 percent of the harvested area is irrigated, although a significant portion may only receive supplemental applications.

Rapeseed is the second most important winter crop with nearly 7.0 million hectares. Irrigation covers about 55 percent of total area, though a significant portion of this acreage receives only partial applications to supplement rainfall. The accompanying maps show that rabi cultivation is heavily centered in the northern half of the country. Wheat farming is concentrated along the Gangetic Plain and northwestern states. The largest area devoted to wheat occurs in the State of Uttar Pradesh, but the most intensive area of cultivation lies in Punjab and northern Rajasthan. Rapeseed farming is primarily focused in the State of Rajasthan, though cultivation of the crop is lightly dispersed over most of northern India.

Irrigated wheat normally is sown in November following the harvest of summer-grown rice, cotton, corn, sorghum, millet, sugarcane, or pulses. High-yielding varieties predominate on irrigated land, while field preparation is carried out by both mechanical and animal traction. The mechanization of major agricultural tasks is expanding but is overshadowed in the majority of states by animal power. Wheat is grown predominantly as a mono-crop, or is intercropped with rapeseed. Fertilizer applications are highest on irrigated land, as is yield response. Irrigated wheat yields average about 2.5 tons per hectare. The growing season averages 150 to 160 days in the northwest states and 120 to 140 days in the northeast.

Rainfed wheat is concentrated in the central Indian states of Madhya Pradesh, Maharashtra, and Karnataka. These areas experience wide fluctuations in yields owing to their reliance on sparse winter rainfall. Fertilizer applications are light to nonexistent while short-season drought-resistant varieties predominate. Dryland wheat yields average approximately 1 ton per hectare.

Rapeseed is the major companion crop to wheat and is grown under rainfed or semi-irrigated conditions; varieties are adapted to primarily dry and infertile growing areas. Rapeseed is cultivated at a lower level of management and investment than wheat with improved varieties covering 25 percent of the total area or less. Traditionally, farmers have considered rapeseed a higher risk to cultivate owing to its susceptibility to insects, frost, and drought. The optimum planting time is October with the bulk of the harvest occurring in February. Of the 5 oilseed crops which are classified as "rapeseed" in the country, Indian mustard is the most important; others include yellow sarson, brown sarson, toria, and taramira. Indian mustard accounts for approximately 70 percent of the total rapeseed area and is characterized by wide agroclimatic adaptability. Growing seasons vary in length, ranging from 70 to 90 days for toria and 150 days for taramira. The short-season varieties have worked well in an intercropping pattern with wheat benefiting from better utilization of limited water supplies.

Crop Yields

Historically, wheat and rapeseed yields have been low by world standards. This has been the result of a combination of natural and developmental obstacles. Both crops primarily are grown during the semi-arid winter season and require an extensive irrigation infrastructure with adequate water supplies. The rainfed portion of both crops is prone to wide fluctuations in yield, receives lower input and management attention, and is often sown with inferior varieties. Irrigation development has significantly expanded since the early "Green Revolution" days, with net irrigated area rising from about 25.0 million hectares in 1960 to about 43.0 million in 1987. The capability to bring these 2 crops under full-irrigation, however, is not likely any time soon. Crop inputs and improved seed continue to be expensive, on a relative basis. Fertilizer application rarely occurs at recommended levels, pesticide applications are plagued by lack of timeliness and improper dosage, while high-yielding seed is either not available in sufficient quantities or is too expensive for many growers.

Despite these continuing deficiencies, wheat and rapeseed yields have steadily improved over the years. Wheat has exhibited a more stable long-term growth trend, averaging more than 4-percent increase per annum for the last 20 years. Rapeseed yield, on the other hand, remained essentially stagnant until 1980. Varietal research had been conducted for about a decade, following the initiation of a major oilseeds development mission in the early 1970's. By 1982, the research began to show results. Over 30 improved varieties were released nationally with the expectation that they would raise national yields by 20 percent. Field trials by farmers in 1982 and 1983 indicated potential crop yields averaging 2.4 tons per hectare. The end result of their wider adoption was that national yield has grown by an average 8 percent per year for the past 13 years.

Future yield improvements for both wheat and rapeseed will likely continue in a gradual manner. A significant gap still exists between the potential yield of current cultivars and that achieved by the average Indian farmer. Growth ultimately relies on the continued expansion of irrigation, input use, and improved seed. It also depends on improvements in farm management and agronomic skills. Even without a substantial increase in the resource base, such as irrigation, significant growth can be realized through better crop management.

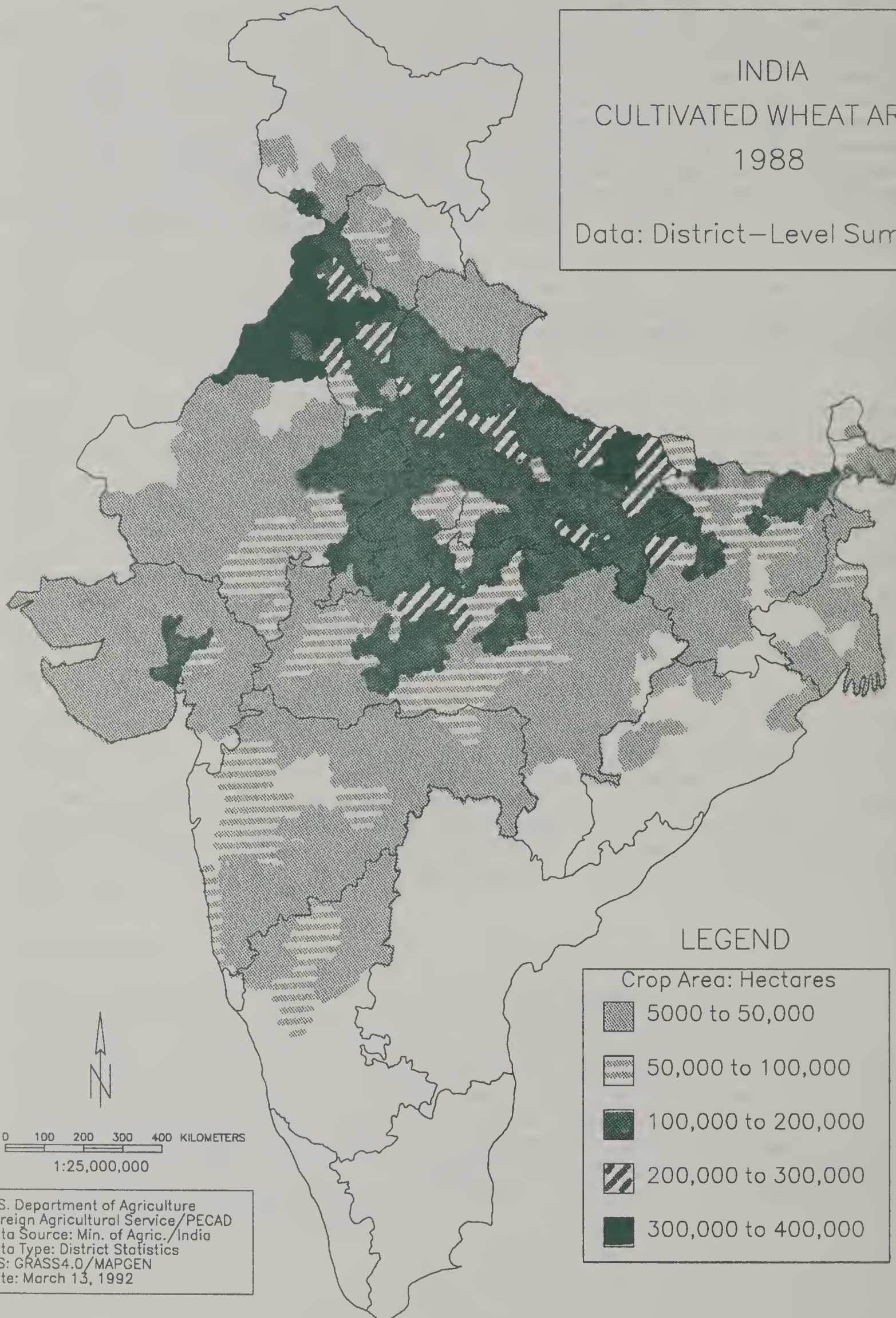
Policy Outlook

Government policies targeting key crops have generally been a success in the past, primarily because of the long-term support of crop research and development. The Government also has demonstrated that it can effectively encourage the expansion of crops through price incentives. Official programs relating to agricultural production likely will continue along these lines in the near future. Swings in price incentives between the major grain and oilseed sectors also are likely in the short-run, as the Government acts to redress significant production shortages. The basic long-term policy objective of the Indian Government remains unchanged -- to promote self-sufficiency in foodgrains and oilseeds production.

The one area which may see considerable change is that of agricultural subsidies. The Government provides subsidies for a large part of the production sector through special rates for electric power, fertilizer, seed, irrigation equipment, and management costs. The ability to continue these programs at current levels is in jeopardy due to serious budget and foreign exchange shortfalls. Changes to these programs, however, are politically sensitive due to the huge farm population (estimated at 665 million people). Addressing the need to gradually wean farmers from such subsidies, the Government raised fertilizer prices in 1991 and 1992. The most recent adjustment which occurred in August, effectively doubled the price of potassium and phosphorus fertilizers. Additional price adjustments are expected in future years.

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INDIA
CULTIVATED WHEAT AREA
1988
Data: District-Level Summary



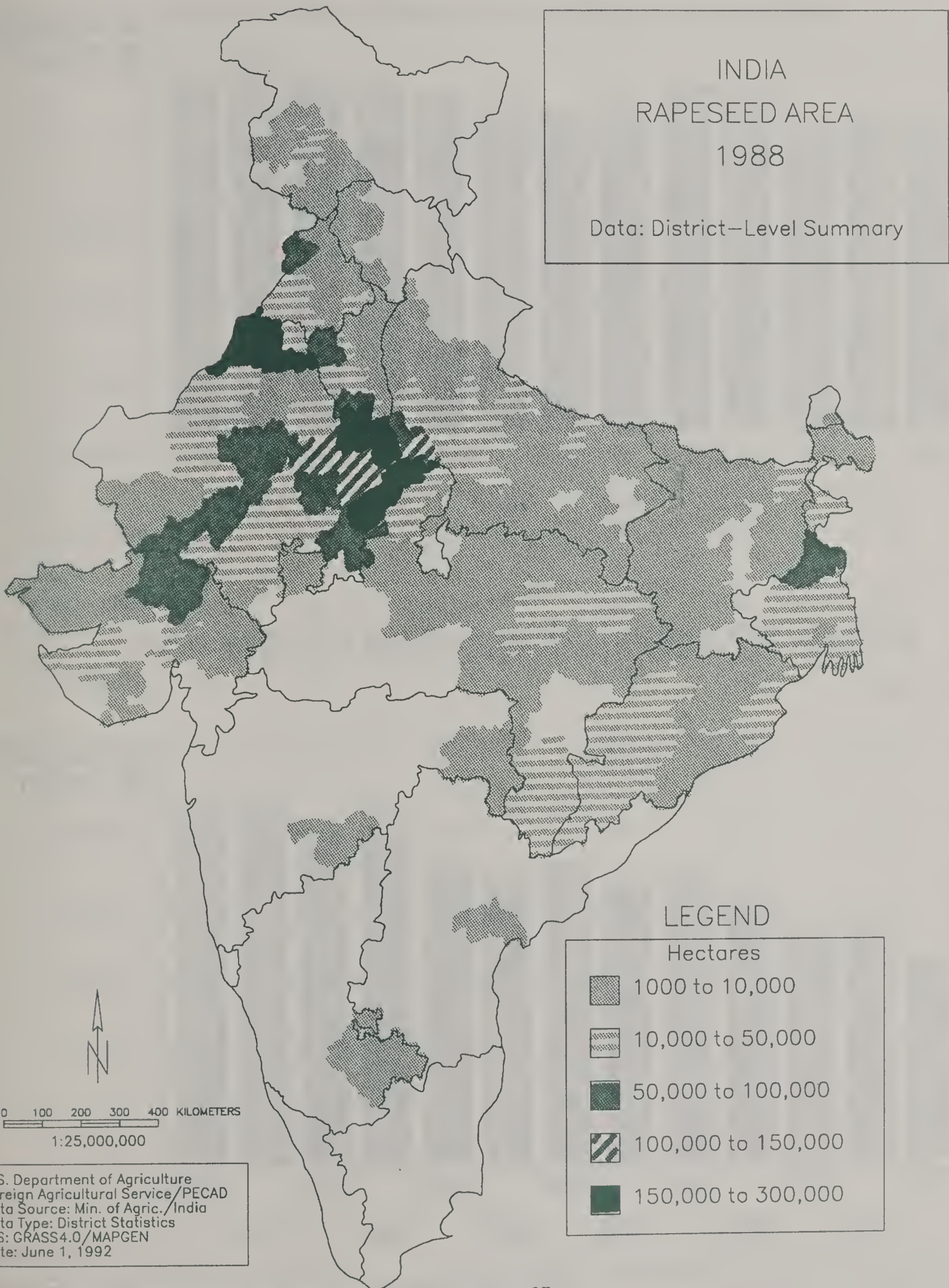
LEGEND

Crop Area: Hectares

- 5000 to 50,000
- 50,000 to 100,000
- 100,000 to 200,000
- 200,000 to 300,000
- 300,000 to 400,000

U.S. Department of Agriculture
Foreign Agricultural Service/PECAD
Data Source: Min. of Agric./India
Data Type: District Statistics
GIS: GRASS4.0/MAPGEN
Date: March 13, 1992

CHART 5



INDIA: Wheat and Rapeseed Area

Million Hectares

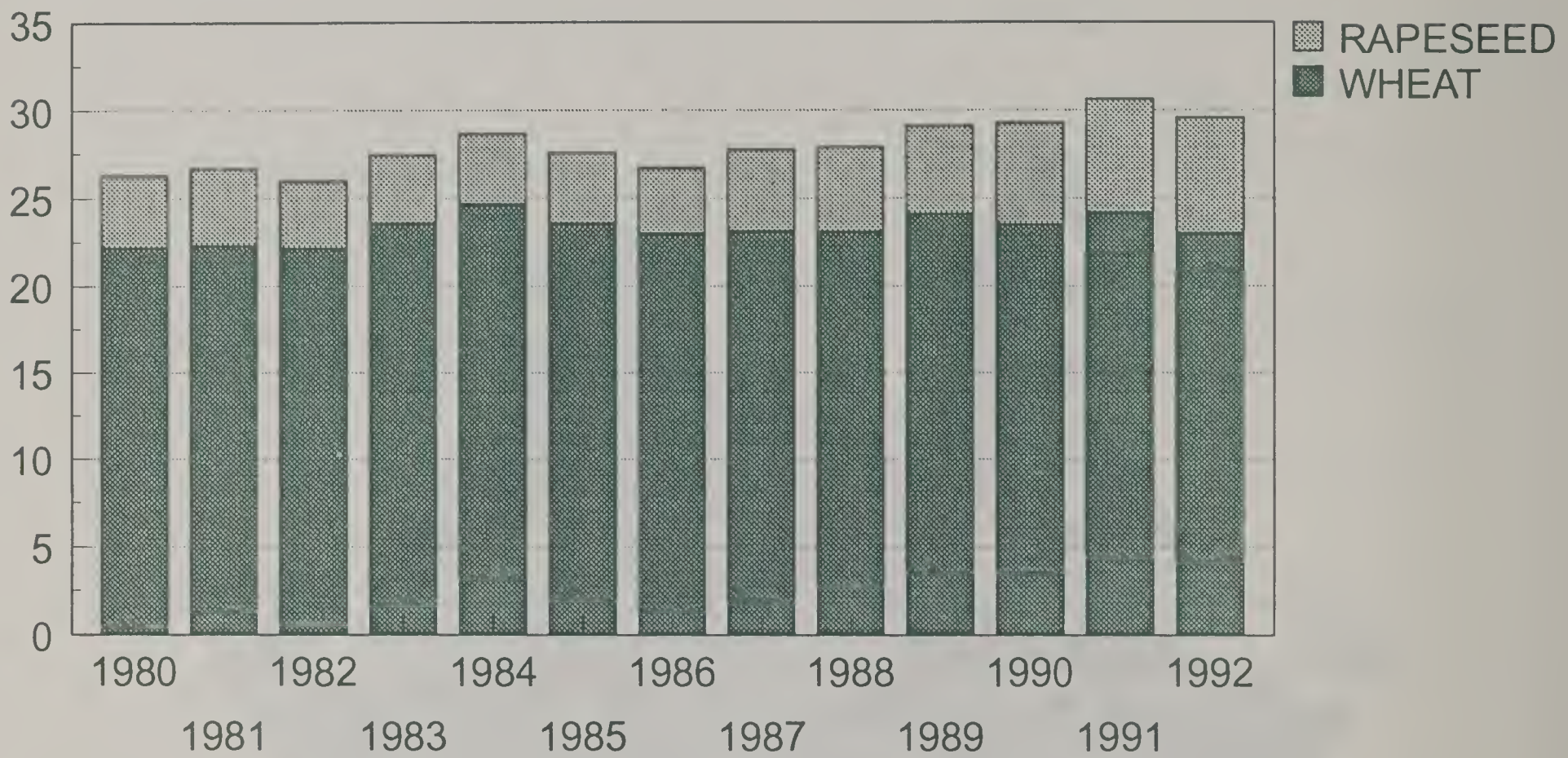


CHART 7

INDIA: Wheat and Rapeseed Production

Million Tons

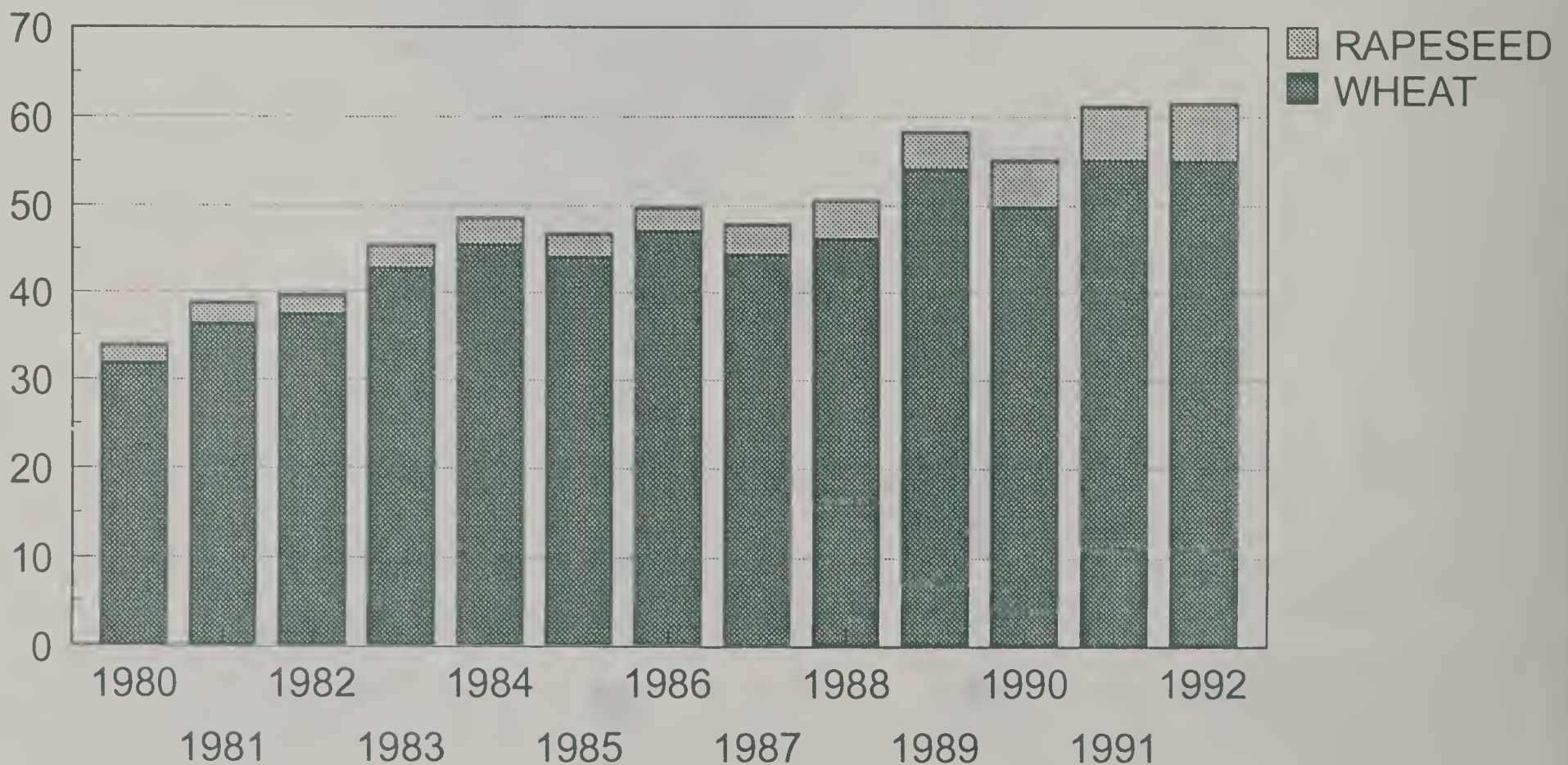


TABLE 24

INDIA: Wheat & Rapeseed Statistics

(Area in MHa; Yield in T/Ha; Production in MMT)

	WHEAT			RAPESEED		
	AREA	YIELD	PRODUCTION	AREA	YIELD	PRODUCTION
1980/81	22.17	1.44	31.83	4.11	0.49	2.00
1981/82	22.28	1.63	36.31	4.40	0.54	2.38
1982/83	22.14	1.69	37.45	3.83	0.58	2.21
1983/84	23.57	1.82	42.79	3.87	0.67	2.61
1984/85	24.67	1.84	45.48	3.99	0.77	3.07
1985/86	23.56	1.87	44.07	3.98	0.67	2.68
1986/87	23.00	2.05	47.05	3.72	0.70	2.60
1987/88	23.13	1.92	44.32	4.62	0.75	3.46
1988/89	23.06	2.00	46.17	4.83	0.91	4.38
1989/90	24.11	2.24	54.11	4.97	0.83	4.13
1990/91	23.50	2.12	49.85	5.78	0.90	5.23
1991/92	24.17	2.28	55.13	6.47	0.93	6.00
1992/93	22.98	2.39	55.00	6.60	0.98	6.45

Source: Official USDA Database

February 1993

Production Estimates and Crop Assessment Division, FAS, USDA

DECIDUOUS FRUIT AND TABLE GRAPE SITUATION

Following the weather-reduced output of 1991/92, production of apples and pears by the world's leading commercial producers in the Northern and Southern Hemispheres is expected to reach record levels during the 1992/93 season. Apple production is estimated at 24.1 million tons, up 31 percent from 1991/92. Pear production is estimated at 5.8 million tons, a 24 percent increase from last season. Table grape production totaled a record 4.6 million tons in 1992, up 3 percent from 1991.

Apple production in selected Southern Hemisphere countries for 1992/93 is forecast at 3.0 million tons, down 8 percent from the record 1991/92 crop. Southern Hemisphere pear production is projected at 905,800 tons, down 10 percent from the revised 1991/92 estimate of 1.0 million. Preliminary estimates indicate that table grape production in the Southern Hemisphere will increase 2 percent in 1993, to a record 1.0 million tons.

APPLES: The 5 commercial producers in the Southern Hemisphere are expected to harvest 3.0 million tons of apples during the 1992/93 season (crop harvested early in 1993), 8 percent below the record 1991/92 crop. The Argentine apple crop sustained extensive frost damage which reduced production 33 percent from 1991/92 and more than offset the record crops projected for Chile, New Zealand, and South Africa.

Chilean apple production is expected to show continued growth in 1992/93, reaching a record level of 860,000 tons, 2 percent larger than the 1991/92 crop. Chile's increased apple production is mainly the result of young orchards reaching maturity and increased tree density in existing orchards. Over the past decade, apple production increased at an average annual rate of 9 percent.

The 2-percent production increase forecast for Chile this season is the smallest single-year increase since the early 1970's. The slowdown in production growth is attributed to diminished economic returns. Growers believe the reduced profitability of this crop stems from overproduction, excessive export levels, the appreciation of the Chilean peso versus the U.S. dollar, and inadequate quality controls. The lapse in quality control efforts allegedly forced export prices down an average of 10 percent during the 1991/92 season.

Argentina's 1992/93 apple crop is expected to decline 33 percent, to 740,000 tons, the lowest level since 1985/86. The three main fruit producing provinces -- Neuquen, Rio Negro, and Mendoza -- were adversely affected by frosts during the flowering and fruit-setting stages in October and November. Red Delicious apples, which account for 65 percent of total production, were hardest hit. Granny Smith apples, which account for 29 percent of total production, also were adversely affected.

A second consecutive record crop is expected in South Africa where production in 1992/93 is projected at 602,100 tons, up 3 percent from 1991/92. To date, weather has been favorable in most production areas, despite some minor hail damage. Current projections indicate that apple production in South Africa will reach 800,000 tons by 1994/95 mainly due to area expansion. Planted and harvested area for 1992/93 are forecast at a record 19,500 and 15,000 hectares, respectively.

The South African fruit industry, centered in Cape Province, is in the process of implementing an integrated fruit production (IFP) plan. Central to this plan is the management of pest and disease problems through an integrated pest management system which is expected to result in environmentally friendly production. Separate IFP guidelines have been compiled for stone fruit, pome fruit, and table grapes. The aim is to have the IFP plan fully operational throughout the industry by 1996.

New Zealand also is expected to harvest a second consecutive record apple crop. Apple production in 1992/93 is estimated at 489,400 tons, up 10 percent from a year ago. Early-season weather in the main apple-producing regions were variable. A cold, wet spring delayed the normal onset of the season by 2 to 3 weeks. However, warm weather in November improved production prospects significantly. Blossoming in all regions was good and indications are that the resulting fruit set will be adequate to sustain the record crop forecast. Since there has been no repeat of the devastating hail storms which damaged fruit in the Nelson, Marlborough, and Canterbury regions early last season, the quality of the crop is expected to be significantly better than it was last year. New Zealand continues to shift production towards the premium varieties -- Braeburn, Royal Gala, and Fuji. Braeburn and Royal Gala now account for 40 percent of apple production, up from 15 percent in 1988/89. Granny Smith and Red Delicious now constitute only 38 percent of the crop, down from 63 percent in 1988/89.

Australia's apple production is expected to increase marginally in 1992/93, to 316,000 tons. Growing conditions during the 1992/93 season have been generally favorable in the major apple producing regions. Throughout Australia, some of the older, poorly tended orchards have been uprooted and replaced by high-density plantings of superior dwarf varieties that will produce fruit earlier than traditional varieties. These new plantings will achieve a lower yield per tree, but a higher yield per area planted. The Australian Bureau of Agricultural and Resource Economics predicts that, by 1996/97, production will total 340,000 tons from 4.7 million bearing trees.

PEARS: Pear production in the Southern Hemisphere for the 1992/93 season (crop harvested early in 1993) is projected at 905,800 tons, down 10 percent from 1991/92. The downturn primarily reflects a 32-percent reduction in Argentina where early-season frosts (October-November) are expected to lower 1992/93 pear production to 285,000 tons.

Pear production in Chile is expected to total a record 212,000 tons in 1992/93, up 16 percent from the previous record set in 1991/92. Pears are one of the few Chilean deciduous fruit crops that continue to expand rapidly. Nearly 40 percent of planted area has not yet reached the bearing stage. An additional 30 to 40 percent of the area planted to pears is still in the early, low-yielding stage of production. Asian pears, also known as sand pears, constitute approximately 11 percent of the planted area. This apple-shaped fruit is providing excellent returns to producers. Other major varieties grown are Packam's Triumph, Beurre Bosc, Bartlett, Beurre d'Anjou, and Winter Willis. The latter is used primarily for pollination purposes.

Pear production in South Africa continues to expand, with 1992/93 output projected at 221,300 tons, a 3-percent increase over 1991/92. If realized, this would be South Africa's fourth consecutive record crop and reflects its successful area expansion program. Planted and harvested area for 1992/93 are estimated at 10,210 hectares and 7,815 hectares, respectively.

Australia's pear production in 1992/93 is forecast at 169,000 tons, slightly higher than the 1991/92 crop of 167,000 tons. The 1992/93 crop set approximately 3 weeks late and, despite unfavorably warm, moist weather, has progressed well. The replacement of traditional pear varieties with newer varieties, especially the Asian pear "Nashi", will keep pear yields low until the new plantings mature.

The Australian Apple and Pear Growers Association (AAPGA) signed a charter in November 1991 which calls for a 50-percent reduction in pesticide use by 1995 and a 75-percent reduction by the year 2000. The AAPGA has joined forces with the National Association for Sustainable Agriculture, Greenpeace, the Australian Conservation Foundation, and the Australian Consumers Association to formulate a plan that will achieve these targets. The AAPGA's objective is to address consumer concerns regarding pesticide use and to be seen as environmentally responsible.

TABLE GRAPES: The forecast for Southern Hemisphere table grape production in 1993 is 1.0 million tons, 2 percent higher than the 1992 level and 18 percent greater than the previous 5-year average. The increase is forecast despite a 24-percent, frost-induced reduction in Argentina's table grape crop.

Table grape production in Chile is forecast to increase 7 percent in 1993, to a record 750,000 tons. The excellent performance of this crop stems from steady increases in both area and yields. For 1993, planted area is forecast at a record 48,800 hectares, of which 39,250 hectares are bearing.

Frost will reduce Argentina's 1993 table grape crop by 24 percent, to 130,000 tons. Mendoza Province, where nearly 70 percent of the grapes are produced, sustained frost damage in October and again in early November. The eastern and southern areas of the province were the most severely affected. The frosts, which are very unusual for that time of year, delayed sprouting and burned many of the buds. Hail damage that occurred in early February may decrease production even further.

South Africa's table grape production is forecast at 138,800 tons, up 9 percent from 1992 and potentially a fifth consecutive record crop. The increase reflects steadily expanding table grape area which, for 1993, is projected at 7,025 hectares planted and 4,675 harvested.

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TABLE 25
APPLE PRODUCTION – Selected Countries
(1,000 Metric tons)

	1990/91	1991/92	1992/93 1/
NORTHERN HEMISPHERE			
NORTH AMERICA			
Canada	539.7	511.2	550.0
Mexico	520.0	550.0	600.0
United States	4,398.4	4,458.4	4,876.5
Total	5,458.1	5,519.6	6,026.5
EUROPEAN COMMUNITY:			
Belgium/Luxembourg	235.1	139.0	492.1
Denmark	70.0	55.0	90.0
France	1,895.4	1,235.9	2,210.0
Germany	2,222.0	1,164.8	3,206.2
Greece	341.8	180.0	330.0
Italy	2,102.0	1,868.8	2,263.3
Netherlands	431.0	223.0	570.0
Spain 2/	635.1	462.1	1,003.4
United Kingdom	264.0	285.6	338.0
Total	8,196.4	5,614.2	10,503.0
OTHER EUROPE:			
Austria 2/	268.4	243.2	251.9
Hungary	945.5	859.0	730.0
Norway	49.5	50.8	50.9
Sweden	68.3	54.1	85.0
Switzerland 2/	313.3	118.4	426.0
Turkey	1,900.0	1,900.0	1,950.0
Total	3,545.0	3,225.5	3,493.8
TOTAL EUROPE	11,741.4	8,839.7	13,996.8
ASIA:			
Japan	1,053.0	760.3	1,025.0
Taiwan	12.6	16.9	16.5
Total	1,065.6	777.2	1,041.5
Total Northern Hemisphere	18,265.1	15,136.5	21,064.8
SOUTHERN HEMISPHERE 3/			
Argentina	950.0	1,100.0	740.0
Australia	289.0	312.0	316.0
Chile	750.0	840.0	860.0
New Zealand	424.7	443.4	489.4
South Africa	543.5	582.3	602.1
Total Southern Hemisphere	2,957.2	3,277.7	3,007.5
WORLD TOTAL	21,222.3	18,414.2	24,072.3

1/ Preliminary. 2/ Does not include apples produced exclusively for processing. 3/ For Southern Hemisphere countries, data refer to crops harvested in the second year indicated.

TABLE 26
PEAR PRODUCTION – Selected Countries
(1,000 Metric tons)

	1990/91	1991/92	1992/93 1/
NORTHERN HEMISPHERE			
NORTH AMERICA			
Canada	17.2	18.4	19.0
Mexico	43.7	27.0	28.5
United States	874.3	820.6	861.7
Total	935.2	866.0	909.2
EUROPEAN COMMUNITY:			
Belgium/Luxembourg	62.2	68.0	101.0
Denmark	6.9	5.7	6.0
France	318.5	224.0	408.3
Germany	379.6	225.3	536.7
Greece	90.6	64.1	90.0
Italy	1,032.7	770.5	1,035.0
Netherlands	90.0	96.0	101.0
Spain 2/	449.4	367.8	607.0
United Kingdom	36.7	38.1	25.9
Total	2,466.6	1,859.5	2,910.9
OTHER EUROPE:			
Austria 2/	41.0	36.2	38.9
Norway	5.6	4.1	4.1
Sweden	10.9	7.6	11.0
Switzerland 2/	63.9	73.9	147.8
Turkey	413.0	403.0	410.0
Total	534.4	524.8	611.8
TOTAL EUROPE	3,001.0	2,384.3	3,522.7
ASIA:			
Japan	443.0	434.5	452.0
Total Northern Hemisphere	4,379.2	3,684.8	4,883.9
SOUTHERN HEMISPHERE 3/			
Argentina	275.0	420.0	285.0
Australia	160.0	167.0	169.0
Chile	163.0	182.0	212.0
New Zealand	15.1	17.6	18.5
South Africa	206.4	215.3	221.3
Total Southern Hemisphere	819.5	1,001.9	905.8
WORLD TOTAL	5,198.7	4,686.7	5,789.7

1/ Preliminary. 2/ Does not include pears produced exclusively for processing. 3/ For Southern Hemisphere countries, data refer to crops harvested in the second year indicated.

TABLE 27

TABLE GRAPE PRODUCTION – Selected Countries

(1,000 Metric tons)

	1990	1991	1992	1993 1/ 2/
NORTHERN HEMISPHERE				
France	128.0	69.0	121.3	N/A
Greece	287.6	312.9	300.0	N/A
Italy	1,212.5	1,410.8	1,490.0	N/A
Japan	276.1	270.6	275.7	N/A
Mexico	342.0	345.0	300.0	N/A
Spain	476.8	471.8	435.4	N/A
United States	770.2	726.1	727.5	N/A
Total No. Hemisphere	3,493.2	3,606.2	3,649.9	N/A
SOUTHERN HEMISPHERE				
Argentina	146.0	160.0	170.0	130.0
Chile	660.0	640.0	700.0	750.0
South Africa	110.5	112.2	127.0	138.8
Total So. Hemisphere	916.5	912.2	997.0	1,018.8
WORLD TOTAL	4,409.7	4,518.4	4,646.9	N/A

1/ Preliminary. 2/ N/A = not available until October 1993.

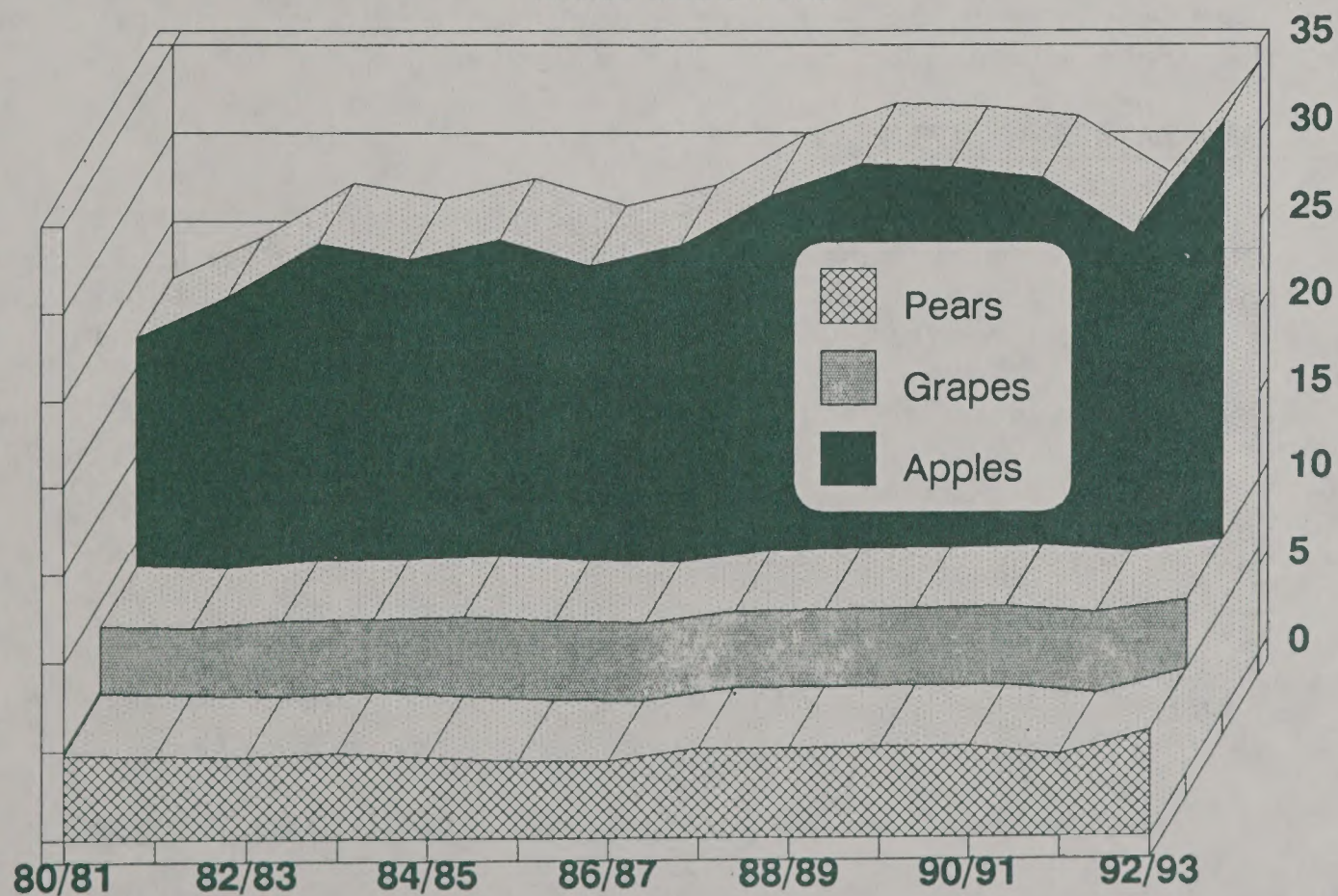
February 1993

Production Estimates and Crop Assessment Division, FAS, USDA

CHART 8

Deciduous Fruit Production In Selected Countries

Million Metric Tons



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